To: Nancy Creel-Gross, Assistant Vice President, HR Operations & Workday@Yale University

From: Student & Temporary Hiring and Lifecycle Management (STHLM) Service Group

        Russell Epstein, STHLM Group Lead

cc: BOLT, Sandy Stein, STHLM Service Group

Date: January 26, 2015

Re: **Recommendation Memo #2 from the STHLM Service Group**

This memo outlines the second set of recommendations from the STHLM Service Group on Workday Business Process functionality anticipated in Release 1. These recommendations are focused on the Request Compensation Change business process (090-080).

Please let me know if you have questions or require any clarification. I would be happy to discuss in greater detail. My group and I thank you for your consideration, and we look forward to your response.

Recommendations:

1. Need the ability to change compensation for a particular job held by a temp. Note that temps may hold multiple jobs, in the same or multiple supervisory orgs, and each job may have different rates of pay.
2. If date for the compensation change is retroactive, need a way to ensure that the change impacts the correct position (see #1).
3. Use branching to limit reason code options based on type of employee.
4. Warn initiator and approver(s) if date is retroactive.
5. For a non-salaried worker, the rate of pay should be displayed on the same basis he/she is paid. For example, hourly, semi-monthly, etc.
6. An online guide needs to be available in Workday to explain the reason codes in detail.
7. Warn initiator and approver(s) if compensation change exceeds 10%.
8. In comment boxes, if there is a space limit, show the number of characters remaining.
9. When a compensation change is approved, add a to-do item for the manager to speak with the employee.
10. In the approval workflow, Comp approval should occur prior to Lead Administrator approval.
11. Validations need to exist to prevent conflicts for students paid through external pay systems (e.g. GSPS, Timesheet X). Do not allow comp changes to be made in Workday for student workers.
12. Need the ability to attach supporting documents (or a link to the documents) at go-live.

ID#	Business Process/Topic	Questions/Concerns Raised	Follow up/ Current Answer/Resolution	Recommendations for Further Consideration
22	090-080 Request Compensation Change	• Can users pick the incorrect reason code?	o Yes, it is up to the approvers to catch down the line	-Limit options based on type of employee. -Use branching to limit reason code options based on type of employee -An online guide needs to be available in Workday to explain the reason codes in detail
23	090-080 Request Compensation Change	• Can you pick a date in the past?		If date for the compensation change is retroactive, need a way to ensure that the change impacts the correct position
24	090-080 Request Compensation Change	• Can temps have pay displayed hourly by default?		For a non-salaried worker, the rate of pay should be displayed on the same basis he/she is paid. For example, hourly, semi-monthly, etc
25	090-080 Request Compensation Change	• Do employees get a notification that salary/benefits were changed?	o No notification, but it will show up when they look at their salary info.	
26	090-080 Request Compensation Change	• To do: look at codes to see if they are the sufficient explanation.		.
27	090-080 Request Compensation Change	• Recommendation that a flag be thrown up for past dates and large percentage increases.		Warn initiator and approver(s) if date is retroactive
28	090-080 Request Compensation Change	• Is there a character limit on comment boxes?		In comment boxes, if there is a space limit, show the number of characters remaining.
29	090-080 Request Compensation Change	• Is a notification of approval sent to the manager?	o A to-do can be added as a step at the end of the process as a task for the manager.	When a compensation change is approved, add a to-do item for the manager to speak with the employee
30	090-080 Request Compensation Change	• Recommendation that Comp approval comes before Lead Administrator		In the approval workflow, Comp approval should occur prior to Lead Administrator approval.
31	090-080 Request Compensation Change	• Question: will employees be able to see comments if they get promoted above one of the commenters in the future? o Who can see comments. Is it role based, person based, etc.?		
32	090-080 Request Compensation Change	• Will there be an ability to attached documents?	o No, not when we go live. Still questions about where/what is the personnel record and who has access.	Need the ability to attach supporting documents (or a link to the documents) at go-live

Student Temporary Hiring Service Group
Business Process P2 Review Session - Question/Actions Log

ID#	Business Process/Topic	Questions/Concerns Raised	Follow up/ Current Answer/Resolution	Recommendations for Further Consideration
33	090-080 Request Compensation Change	• Temps and students hold multiple jobs. How will this be accounted for in Workday?		Need the ability to change compensation for a particular job held by a temp. Note that temps may hold multiple jobs, in the same or multiple supervisory orgs, and each job may have different rates of pay;
34	090-080 Request Compensation Change	• Many students have multiple jobs at different rates of pay. What is the mechanism to ensure compensation changes to the correct job?		Validations need to exist to prevent conflicts for students paid through external pay systems (e.g. GSPS, Timesheet X). Do not allow comp changes to be made in Workday for student workers.
34	090-080 Request Compensation Change	• Will terms like "Institutional Base Salary" be explained	Yes, definitions will be placed in the guides	An online guide needs to be available in Workday to explain the reason codes in detail