Welcome to a New Workday!

TAMU Monthly Workday Forum
April 19, 2017
Agenda

What’s Happening?

- ARCHITECT: FEBRUARY 2016
- CONFIGURE & PROTOTYPE: JUNE 2016
- TEST: DECEMBER 2016
- DEPLOY: JULY 2017
- GO LIVE: DECEMBER 2017

Getting Everyone Ready to Use

What’s Next?

What’s New to You?
What’s Happening?
Project Activities

- **Configure & Prototype**: June 2016
- **Test**: December 2016
- **Deploy**: July 2017
- **Go Live**: December 2017

- **Project and Member Communication**
- **Data Cleansing**
- **Security Role Mapping, Member decisions on primary responsibilities**
- **System Integration Testing**: Through June 1
- **Workday Life, Event 1 for Core**: April 27
Getting Everyone Ready to Use Workday
Change Readiness “Pulse Checks”

- Change Readiness Survey – Leadership #2 (of 3)  
  *February 27*

- Change Readiness Survey – Core HR, PAY, BEN #1 (of 3)  
  *March 6*

- Change Readiness Survey – Managers #1 (of 3)  
  *March 27*

- Change Readiness Survey – HR Departmental Processors / Liaisons #1 (of 3)  
  *March 27*
### Workday Life Virtual Events

<table>
<thead>
<tr>
<th>Event</th>
<th>Current Content</th>
</tr>
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</table>
| **April 27, 1 – 2:30p** | • What’s New  
• Core Concepts  
• Employee and Manager Self Service Overview |
| **Early June** | Change impacts for:  
• Core HR  
• Recruiting  
• Talent |
| **Late July** | Change impacts for:  
• Time and Absence  
• Payroll  
• Safety Incident |
| **Late September** | • Training Timelines  
• Go Live information  
• How to get help at Go Live |

- **90 minutes**
- **Virtual using WebEx**  
  - Invitations sent to those mapped to Core security roles
- **Focus on Core security roles**  
  - Benefits Partner  
  - Budget Partner  
  - Compensation Partner  
  - Faculty Partner  
  - Graduate Studies Partner  
  - HR Partner  
  - Payroll Partner  
  - Recruiting Partner  
  - Retiree Partner  
  - Safety Partner  
  - System Benefits  
  - Talent Partner  
  - Workers Compensation Partner
What We Are Doing to Get Ready

**TAMU MONTHLY FORUMS**

- **Thursday, 5/18**: Equine Center Andras Classrooms A&B from 12:00pm-1:30pm
- **Thursday, 6/15**: Rudder 501 from 12:00pm-1:30pm
- **Wednesday, 7/19**: GSC 101 from 10:30am-12:00pm
- **Thursday, 8/17**: Equine Center Andras Classroom A&B from 12:00pm-1:30pm
- **Monday, 9/18**: GSC 101 A&B from 1:30pm-3:00pm
- **Thursday, 10/19**: Rudder 601 from 12:00pm-1:30pm
- **Future meetings yet to be scheduled through Feb 2018**
## Training Strategy

<table>
<thead>
<tr>
<th>Who</th>
<th>How</th>
<th>When</th>
</tr>
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<tbody>
<tr>
<td>HR, Payroll, Benefits Managers and Partners</td>
<td>• eLearning&lt;br&gt;• Classroom</td>
<td>• September – October, 2017&lt;br&gt;• October – November, 2017</td>
</tr>
<tr>
<td>HR Departmental Processors / Liaisons</td>
<td>• eLearning&lt;br&gt;• WebEx</td>
<td>• September – October, 2017&lt;br&gt;• October – November, 2017</td>
</tr>
<tr>
<td>Managers</td>
<td>• eLearning&lt;br&gt;• Video “How To”&lt;br&gt;• Checklists</td>
<td>• October – November, 2017</td>
</tr>
<tr>
<td>Faculty, Staff, Student Worker, Graduate Assistant, Affiliate, Working Retiree, Retiree, Surviving Spouse</td>
<td>• Video “How To”&lt;br&gt;• Checklists</td>
<td>• October – November, 2017</td>
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Manager Preparation

Drop-In Learning Labs, with Manager Scripts

Manager Q&A and Readiness Forum

November 2017
Readiness Strategy

Employee Preparation

November 2017
• Drop-In Learning Labs, with Employee scripts
• On-line Video

December 2017
• Day 1 Login Checklist
Next Steps
Next Steps

Ongoing Communication

- Monthly meetings between project team and member representative(s)
- Monthly member updates
- Regular web updates
  - Employees.tamu.edu/workday
  - YouTube channel (subscribe)
  - workday.tamus.edu
  - News You Can Use (subscribe)

Project Work

- Continue System Integration Testing
- Continue to clean up data
- Continue mapping Security Roles
- Continue developing training
- Monitor member readiness activities
What’s New to You?
## Faculty Extended Pay Plan (EPP) moving to Save for Summer

<table>
<thead>
<tr>
<th>Timeline</th>
<th>Action/Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 31, 2017</td>
<td>• Information finalized for Payroll Offices and EPP participants</td>
</tr>
<tr>
<td>April 30, 2017</td>
<td>• Notification Letters to current EPP Enrollees</td>
</tr>
<tr>
<td>Sept-Dec 2017</td>
<td>• Current EPP program is in place</td>
</tr>
</tbody>
</table>
| Jan 1, 2018           | • Current EPP enrollees will be automatically transferred to “Save for Summer” (SFS).  
                        • Their current % will be translated to flat deduction amount.  
                        • % held back for insurance will convert to flat deduction amount.  
                        • Employee will requests changes through local Payroll Office |
| April 2018            | • Info about the WD multi-bank feature will be publicized to SFS participants.  
                        • Effective date of using WD to hold back net pay instead of SFS is Sept 1, 2018.  |
| May 2018              | • Insurance premiums withheld will be returned to offset 3 months of premiums being deducted – as currently happens with EPP.  |
| Sept 1, 2018 - onward | • <12 month employees (faculty and staff) will have 12 months of insurance premiums withheld over 9 months (Oct-June).  
                        • Those will be returned in May to fund summer insurance premiums.  |
# Comparing the Options

<table>
<thead>
<tr>
<th>Extended Pay Plan</th>
<th>Save for Summer</th>
<th>Multiple Bank Accts</th>
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</thead>
<tbody>
<tr>
<td>Withhold % of net pay</td>
<td>Withhold flat dollar amount of net pay</td>
<td>Direct % of net pay to one + checking and/or savings accounts</td>
</tr>
<tr>
<td>Withhold % of insurance premiums</td>
<td>No insurance premiums withheld</td>
<td>Insurance premiums not affected</td>
</tr>
<tr>
<td>Enroll using a paper form</td>
<td>Enroll using a paper form</td>
<td>Enroll electronically in Workday</td>
</tr>
<tr>
<td>Withdraw at any time; receive reserved pay in the next paycheck</td>
<td>Withdraw at any time; receive reserved pay in the next paycheck</td>
<td>Stop addt’l deposits at any time; access pay in your accts at any time</td>
</tr>
<tr>
<td>Contact your Payroll office to see your current balance</td>
<td>See your current balance through a Workday report</td>
<td>See your current balance through your bank or credit union</td>
</tr>
</tbody>
</table>
Save for Summer Communication Timeline

• March 2017 **Completed**
  – Socialize new program with Payroll Offices (enroll, change, withdraw)

• April 2017 **Letter Completed; Sent to HROs, Payroll Offices to update and distribute to member participants**
  – Letter to participants introducing Save for Summer

• Fall 2017 Letter to participants reminding about Jan 1 change

• January 2, 2018 Save for Summer begins

• April 2018 Letter to participants introducing Workday’s multiple bank account feature
Q&A Regarding EPP Changes

1. Current number of TAMU faculty currently utilizing the EPP Program
   - 356 for TAMU
   - 1597 for the TAMU System

2. How does the WD plan differ from EPP?
   - WD will withhold a FLAT amount of their monthly paycheck for the SFS program vs. the current % amount that EPP withholds.
   - WD will not auto adjust during the year if the individual’s salary is adjusted during the year.

3. Can SFS also be used to distribute the annual premiums over 9 months for faculty not participating in the EPP?
   Yes, starting Sept 1, 2018, anyone working <12 months will have 12 months of insurance premiums deducted over 9 months (Oct-June). Participating in Save for Summer or using Workday’s multiple bank account feature to hold back net pay doesn’t impact the 12/9 insurance premium payments.

4. If an individual leaves the university before the end of the year, will they get their insurance premiums returned to them that were paid for over the first 9 months of the FY?
   Yes. This is the same as it is today – if someone leaves before 8/31, anything held back is refunded.
Change in Biweekly Pay Periods

Effective September 1, 2017 the biweekly pay periods will run from Sunday to Saturday

Benefits
- Employees receive their pay closer to the end of the pay period
- FLSA work week over-time calculations better align with most employees’ actual work week
- TimeTraq can easily support this change, and it is a preferred configuration in Workday

Communication Plan is under development. More to come!!
Effective September 1, 2017 ALL non-exempt (hourly) employees will be paid on the same bi-weekly schedule

- Simplifies the payroll process across all members
- The Sept timeframe allows transitioning employees to receive three paychecks in September, putting pay in their hands quickly
  - Sept 1, pay for time worked in August
  - Sept 15, pay for time worked Sept 1 – Sept 9
  - Sept 29, pay for time worked Sept 10 – 23

Communication plan is under development
Security roles are not *job titles*
  - Determine what you can see and do in Workday

Action performed from a central office (GSC or System level roles) = PARTNER

Action performed from an HR Liaison or Departmental processor =
  - CONTACT - COORDINATOR
  - PROCESSOR - ANALYST
  - ABSENCE PARTNER (only *PARTNER* role to be distributed)
• Paper copies provided today
• Updates for our member will be on the website weekly
  – www.employees.tamu.edu/workday
April’s Word on Workday

The Word On Workday
April 2017

Securing Our Information
Workday’s cloud-based system is delivered with world-class infrastructure, policies, and procedures to ensure that our data is protected. The cloud reduces our dependence on custom software development and ensures that we are always on the current version of Workday with regular upgrades twice a year. Security threats and risks are mitigated through strong internal controls and a comprehensive security program designed to ensure the protection and integrity of personal data.

Learning Workday
Our training strategy is focused on providing essential Workday knowledge and skills to stakeholders who are most impacted by retiring BPP and other legacy applications. Starting September, awareness training will introduce Workday’s core concepts and essential functions. Later, skills training will take a deeper look at how to use Workday to perform role-specific duties. Additional materials including quick reference videos and job aids will be available in SSO through Workday Help.

For more information, visit workday.tamu.edu or contact the Project Helios team at projecthelios@tamu.edu.

Say Hello to a brighter workday.
Questions?

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