Texas A&M University
Workday Forum Questions and Answers   October 17, 2017

SUBJECT	QUESTIONS AND ANSWERS
Recruiting	**Q: Is the Recruiting module of Workday for staff only or will it include Faculty recruitment as well?** A: Each member will determine whether faculty will be using this module. At this time, TAMU will not be using the Workday recruiting module for Faculty recruiting efforts. **Q: What will Recruitment & Workforce Planning require us to do with the position hiring file? (9/18/2017)** A: Recruitment & Workforce Planning is aware that the documents currently uploaded for a posting in PATH will not be able to be uploaded to Workday. The documents will still be needed for compliance, record retention and review. They are currently exploring the options for all related job requisition documents to be transmitted to Recruitment for completion of a hire and for record retention. Watch the HR Liaison Network News for more information about this solution
On-Boarding / HR	**Q: How will background checks be processed?** A: They will be initiated in Workday, however, the actual background check will not be pulled into Workday. The Recruiting Partner will login to Sterling for the detailed background check information. **Q: What is the Business Process for hiring foreign nationals?** A: Foreign nationals will go through the regular hire process for all employees. Reports to flag IFSS, ISS, etc., have been developed. **Q: Will we still need to enter information into iBenefits?** A: No. iBenefits is being replaced by Workday. Workday is configured to determine if an employee is eligible for benefits. The employee will receive a notification during onboarding to enter their information such as previous ORP eligibility, participation in TRS, etc. Once complete, their information routes to Benefits to confirm the employee is enrolled. **Q: Will HR and payroll still be doing the paperwork for onboarding?** A: All new hire documents will be electronic and maintained in Workday. For I-9 forms, we will continue to utilize Guardian, but it is processed in Workday. As you are processing, you will be able to see where the employee is in the process. **Q: What about uploading the hiring matrix, interview questions and salary above minimum approvals in Workday, how are those uploaded?** A: A hiring matrix is configured in Workday and can be extracted for interview scoring. Handling of hiring documents will vary by member based on their internal processes. Salary approvals will be done outside of Workday based on member processes; however, Compensation Partners in Workday will see if someone is hiring below the pay grade.

Recruitment & Workforce Planning is aware that the position file documents currently uploaded for a posting in PATH will not be able to be uploaded to Workday. The documents will still be needed for compliance, record retention and review. They are currently exploring the options for all related job requisition documents to be transmitted to Recruitment for completion of a hire and for record retention. Watch the HR Liaison Network News for more information about this solution. (Updated 9/18/2017)

Q: As an HR Liaison we have to submit documents to HR and Payroll for them to process: new hire paperwork, checklists, etc. Will all of this be done online in Workday, without paper?
A: All new hire documents are electronic and maintained in Workday.

Q: When a position is reclassified, will we still need to get approvals?
A: Yes. Those approvals are set up in the Workday routing process.

Payroll / Encumbrances

Q: Will Workday encumber salaries?

A: No, you will not see the encumbrance in Workday. Encumbrances will be fed to FAMIS with an overnight feed and you will be able to view the encumbrance in FAMIS the next day. However, The project team heard the concerns and has developed a calculator in Canopy that can be used to calculate exact encumbrances. The calculator results can be printed and attached to the source pay action in Workday. (updated 9/18/2017)

Q: How will title codes for faculty and staff be handled?
A: There will be no title codes in Workday. Workday was selected because it is business process centric. Common titles will be used as identified in the System Wide Pay Plan.

Q: You stated that Canopy will still be around. What will Canopy be used for?
A: Canopy will still be used for payroll source transfers (PST) and fiscal transactions such as DCRs and DBRs. However, you will no longer enter EPAs into Canopy, those will be processed through Workday. It will also be used to calculate the total encumbrances that may be needed for exact payroll sourcing in Workday.

Q: Will the new system be restricted to two decimal points for percentages as currently restricted in Canopy?
A: No, Workday provides a 4 decimal point limit for percentages.

Q: Right now we monitor sponsored project timesheets; will we still be able to do that?
A: Yes, you will be able to see in Workday what you can see now in Canopy.

Q: Monthly BVDs will not need to be approved? What happens if a raise is put in, how do we make sure it is in the system and the employee will get paid correctly?
A: In Workday, there is no departmental approval for submitting payroll. Active employees in Workday will be paid their assigned pay rate. There will be a report similar to the BVD that you may run and review. A list of available “canned” reports will be coming out in November. (Updated 9/18/2017)

Q: How will we process a lump sum vacation payout? Will there still be a form and if so, how will this get to Payroll?

A: Vacation Payouts will be done through a Request One Time Payment business process in Workday. It will route to Payroll through the Workday system. The Payroll Office is identifying the need for a form and the related process routing. Please check back here for updates to this question. (Updated 9/19/2017)

Q: In TimeTraq, you can set the maximum number of hours an employee is able to work. Can this be done in Workday?
A: No, but validations can be set for certain types of employees, like setting a maximum of 20 hours per week for international students.

Q: In TimeTraq there is a default project account that is used for projects; how does Workday handle this?
A: In Workday, the cost allocation can be specified so that certain earning types can have different costing. If you are using projects, you will have a project that your employee will reference.

Q: Transportation will be using Kronos, not Workday for timekeeping. Can we modify slides and handouts to reflect this?
A: Yes, we can provide some handouts and we can help add language for clarification that certain components will not be used by those using Kronos.

Q: Referring to the EPA approval path now, will the hiring supervisor be the final approval? Also with grant accounts, how will they route?
A: Hiring process will go through a business process that is separate from assigning costing. It will go through a Cost Center Approver in Workday and will route to the approver in FAMIS. If it is an SRS account it will route to an SRS approver. There could be a budget office or payroll office approver. It depends upon where you work.

Q: How will this system handle supplemental payroll / payroll adjustments for hours worked and not reported?
A: Workday will allow you to immediately enter payroll hours that were missed and those will be paid on the following pay period. There will no longer be a need to enter supplemental payroll requests for those adjustments.

Q: Can I cancel multiple time sheets? Currently, you cannot cancel multiple timesheets at the same time.
A: Timesheets with no hours do not have to be canceled in Workday. If there are no hours at the end of the pay period it will not process. There will be no manual adjustments of time sheets. Employees can enter their own time for a past pay period and it will pay out on the next pay period if approved.

Q: When does Workday check encumbrances against available account balances?
A: There is no automated budget check. It will only make sure there is a valid account - not that there are available funds.

Q: What constitutes a valid account in FAMIS as it relates to the Workday check? Is a deleted account considered a valid account?
A: The account analysis will be done in FAMIS. A nightly feed from FAMIS will update Workday each evening for any new / deleted accounts. The project team will need to provide follow-up on whether a deleted account will be validated in Workday. Please check back here for updates to this question. (Updated 9/19/2017)

Q: How will processes such as LWOP be added to timesheets / payroll?
A: The good news, Workday knows that if a time off is entered as LWOP, it will reduce their payroll. If added after the pay period ends, it will reduce their next pay period's payroll.

Q: How about graduate students who don't fill out leave but take time off, how does Workday handle this? How will decreases in monthly payroll be processed for a graduate student who does not submit / earn LWOP?
A: In Workday you can place graduate students on LWOP and it will be processed as time off. Short term time off is done as Time Off in Workday.

Q: Since EPAs will be replaced by Workday, when will encumbrances occur on an account?
A: Currently EPAs calculate salary and adjustments and net funding (encumbrance). Workday does not have that view; the business process will run each night and will post in FAMIS the next day. The project team heard the concerns and has developed a calculator in Canopy that can be used to calculate exact encumbrances. The calculator results can be printed and attached to the source pay action in Workday. (updated 9/18/2017)

Q: The project team is hearing concerns from HR Liaisons / Contacts that the inability to see payroll encumbrances in real time is very problematic. There is a strong concern that waiting overnight for a payroll compensation assignment to feed to accounting (with the assumption this feed will only happen after all steps of the business process have been approved), is too long to wait and will create additional work with the multiple routing attempts needed to accurately assign % efforts on funding sources.
A: The project team heard the concerns and has developed a calculator in Canopy that can be used to calculate exact encumbrances. The calculator results can be printed and attached to the source pay action in Workday. (updated 9/18/2017)

Q: Will we be able to enter the exact time off, in hours of the day, in Workday? (9/18/2017)
A: Currently Workday only allows you to enter the total number of hours you're requesting time off. It doesn't allow us to capture the actual time, such as you're taking two hours from 3-5 pm. The System Project Team has voted for this enhancement on Workday's Higher Education community brainstorm board, so it's possible this functionality will become available with a future update.
For now, managers can require the times to be entered in the comments (and send back if not done correctly).

Q: Is there any way to extend the bi-weekly payroll due date? (9/18/2017)
A: Payroll Services has a hard stop that does not allow any additional flexibility for moving the due date/time back.

There are several factors that dictate the deadline and the time required from internal to external submittal. In order for Texas A&M University to get reimbursement from the State, payroll data must be submitted to the State of Texas Uniform Statewide Accounting System (USAS) in accordance with fixed timelines. In addition, there are timelines to ensure the Biweekly payroll direct deposit (ACH) data is routed to Wells Fargo and onto the Federal Reserve in order for the employees' funds to be available on payday. Extending the internal submission timeline would not allow for sufficient time to complete these tasks as well as perform the processes required to ensure we release payroll data to BPP in a timely and accurate matter.

The Wednesday 9:00am deadline from BPP to run Payroll applies to all Texas A&M University System members. Texas A&M AgriLife and the College of Engineering Payroll offices both have TimeTraq due Monday at 3:00pm as compared to Texas A&M University timeline of Monday at 4:00pm.

Q: I have a faculty member on LWOP until 1/16/18. How will I "end leave" in Workday? (9/18/2017)
A: This is still under evaluation by the Project Team to determine the best method to handle these unique situations. It's anticipated that the colleges/departments will most likely have to assist with manual entry after Go Live.

Q: Will there be a period when we can no longer use Canopy/PATH in order to phase to Workday? (9/18/2017)
A: As of 9/19/2017 the Project Team is developing that timeline. This information will be distributed as soon as it becomes available.

Training

Q: Is the Workday video for employees already on the website?
A: Yes, it is on the TAMU Workday website and at the following location: https://youtu.be/e9fzanXidjE

Q: Why isn't Workday replacing TrainTraq as well?
A: When Workday was being considered, a learning management system was not available. Workday now offers this option, but it will not be part of Go Live in 2017.If a decision is made for implementation in the future, more information will be shared at that time.

Q: Will there be live help?
A: Once we go live, ask questions of your HR Liaison. If they can't answer your question, contact HR. Yes, live help will be available at the drop in learning labs provided by your member. For information on the times/locations of the drop in learning labs please visit http://employees.tamu.edu/workday/ and click on the Workday Learning Labs: November drop down screen for more information. (Updated 9/18/2019)

Q: How will the drop-in labs be handled?
A: Right now there are 8 drop-in labs scheduled at the GSC for TAMU. For information on the times/locations of the drop in learning labs please visit http://employees.tamu.edu/workday/ and click on the Workday Learning Labs: November drop down screen for more information. (Updated 9/18/2017)

Q: What is the difference between the Town Hall and the TAMU monthly Forums?
A: The Town Halls are sponsored by the TAMUS Workday project team. The monthly Forums are TAMU's effort to make sure our campus is ready to go live on December 1, 2017. Information on the Forums can be found here: http://employees.tamu.edu/workday/ and click on the Workday Open Forums drop down screen for more information. (Updated 9/18/2017)

Q: Can TAMU make a drop-in learning lab or an e-learning experience a required training that can be assigned to all employees in TrainTraq prior to launch?
A: Yes, there will be drop-in learning labs that individuals can attend. Please visit the

TAMU HR website for updates on the dates and locations. While required training will be assigned by the TAMUS Workday project team, training administrators within individual units can assign any of the TrainTraq e-learning courses to anyone who isn't required to take them.

Retirees

Q: Will retirees need access and how will they get this access?
A: Yes, since HR Connect is being replaced by Workday they will need access to Workday. We will provide more information on *how* they will get access as that information becomes available. Information that can be shared with retirees now to help alleviate retiree concerns are:

If you can use a smartphone, you can use Workday. You will click a Benefits icon that will let you enroll and view your Benefits information.

Short, two or three minute help videos will be available from the SSO menu ("Workday Help") and through the workday.tamus.edu website. You can watch a quick video to help you learn how to navigate through the Benefits enrollment.

Q: We have current staff who are planning to retire prior to the launch of Workday. How do we plan to offer training to retirees who will need to access Workday? How are retirees being informed about the conversion?
A: There will be on-line video available for any employee or retiree. Each member will have the opportunity to decide how best to provide information to their retiree population. Retiree insurance billing changes and communication are being managed by System Benefits Administration.

Implementation

Q: Are all system members going live in December 2017?
A: Yes, all system members will be going live at the same time. Workday will give all faculty, staff, student workers and retirees greater control over their personal information through 24/7 access to information over a secure network. You will be able to access your personal data from any computer or mobile device with internet access.

Employee Self-Service will allow you to initiate tasks through your "All About Me" landing page. The self-service functionality features real-time data and reports and enables you to take action in a variety of business processes.

Q: Will SSO go away?
A: No, Workday will be on a link on the menu within the SSO portal, and will replace several existing buttons (TimeTraq, LeaveTraq, iBenefits, PATH, and Monthly Payroll). Workday Help will also be available on the SSO menu. (Updated 9/18/2017)

Q: Will UIN Search continue to be available?
A: UIN Manager is staying; UIN Search will probably continue with a redesign to accommodate the Workday requirements. You will be able to search for an employee within Workday without knowing their UIN.

Q: When is the UIN created if it is a brand new employee?
A: We will still use UIN Manager to generate a UIN, using the same process as today.

Q: What is the integration status of the reports between Banner and BPP?
A: More information to come on this process.

Q: Will there be integrations between Workday and TrainTraq?
A: There will be trainings offered in TrainTraq for Workday. At go-live, there will not be a training module feature available in Workday and training will continue to be assigned and taken through TrainTraq. (Updated 9/19/2017)

Q: Will employees be able to access their data in Workday from any location, including countries not currently allowed access?
A: Yes, through SSO. If you can get to SSO, you can get to Workday

Q: Is there a timeline for Contact Information to be completed / updated?
A: At this time we do not have a due date for getting that information in. It will be a continuous process of looking at the current information in the system. They are freezing and reevaluating the new information for translation to the new system and will continue to do so through go-live.

Students

Q: Will there be a setting in Workday that will notify departments when a student is dual employed? Will it take the place of the form?
A: You will be able to see that an employee is dual employed. However, the Add Additional Job business process doesn't appear to include all of the needed information for HR to review the potential overtime requirements of the additional position. The Dual Employment Agreement form will continue to be required as supporting documentation for the Workday process at go-live. The form may be updated to include reference to Workday and how to use in support of the Workday process. The form requirement will be evaluated in the months following December 2017, to identify if there is a way to confirm Fair Labor Standards Act compliance through Workday without the paper form. (Updated 10/4/2017)

Q: Will the TAMU student employment website JobsForAggies.edu be replaced by the recruitment module in Workday?
A: We have met with the student employment office at TAMU and shared with them the recruiting capabilities within Workday, but each member is making the decision on using Workday for student employment. Check with the student employment office.

Q: Will there be any process / approval changes for Graduate Assistants and Dual Employment?
A: Workday encourages a streamlined, paperless process. Graduate Assistant documents that require an employment/payroll of > 50% will be routed through Workday to the Office of Graduate and Professional Studies (OGAPS). OGAPS is currently investigating the need for the "Request to Allow Graduate Assistant to Work More Than 50%" form. Please check back here for updates. (Updated 9/18/2017)

Forms/Reports

Q: How will educational release forms, wellness forms, flexible work schedule forms be handled in Workday? Will they be eliminated?
A: As we are going through this implementation process, all forms and requirements are being evaluated as we understand the capabilities of Workday. As information becomes available on specific forms we will share that with you.

Q: What reports are available in Workday vs Business Objects? (9/18/2017)
A: Email sent to Project Team on 9/11/17. Departments may wish to cross-train their staff on the use of Business Objects so they're prepared to pull down reports

after Go Live. There are two Data Warehouse Webex training sessions scheduled to discuss the new HCM universes on September 26, 2017and September 28, 2017. You may register for these courses through TrainTraq:

- 2113209 Workday Impact Training: Focus on Position, Source, Worker
- 2113210 Workday Impact Training: Pay History, Pay History FTE, Pay History Details

Q: When can we expect a crosswalk for canned reports? (9/18/2017)
A: We have made a request to the project team to help us understand the reports that will be available in Workday and/or Business Objects. A list of these available reports are expected in mid-November.

Merit / Budget Process

Q: Administrators are concerned with the merit process due to the uncertainty of how this business process can be managed. If a manager makes an out-of-cycle merit request, does Workday initiate the proper routing for these (all the way up to the appropriate VP)? Does the merit award process know which awards are one-time and which are intended to be base increases? Is there a departmental administrator role that allows this administrator to see all merit recommendations made by all managers within the department? If so, can the administrator make changes to the managers' recommendations as they're looking over all of the departmental merit recommendations? How is merit authority noted/awarded in Workday so a department head knows how much they have to award? Right now we allocate merit funds/authority at the division/college level and each division head/dean makes the determination as to how much each individual reporting unit is to receive, regardless of their calculated amount of authority or funding pool. Is there a reporting capability in Workday that allows a department head to see their award pool and monitor it as individual awards are entered (idea here is to watch a declining balance so department heads can toggle merit recommendations as needed)? What checks and balances are built into Workday for the merit award process?
A: The project team is currently working through the merit process. Merit recommendations can be entered at a manager level; however, the final approval of the merit award is with the department head. The department head role can see all merit recommendations made for individuals within their reporting structure. If the department head delegates this role to an administrator, they can make changes on their behalf. The System will allocate to the University, the University allocates down to the supervisory org level. The budget business process does allow a manager to view/monitor the overall merit allocation balance at the department level. Departments/Colleges may implement internal processes for awarding merit at either a department or college level. (Updated 10/4/2017)

Q: The current Budget Process utilizes an excel worksheet, which is uploaded to BPP. Will we still have excel worksheet uploaded to Workday?
A: During the normal Phase II budget cycle, the awarding of merit and other base salary changes will be processed directly in the Workday application through the Merit Business Process. There will also be an opportunity to award one-time, or lump sum, merit in Workday during this process. Other changes formerly done through the old merit template such as title changes, percent effort changes, adloc, etc. can be made directly in Workday, but outside of the merit cycle. (Updated 10/4/2017)

Q: How does the Budget Prep cycle work in Workday?
A: A spreadsheet upload will be available to process costing allocation changes during Phase II. These source account changes were previously processed through the merit template or on Screen 52 in BPP. The Budget Office will provide more detail and training on the costing allocating template as we approach the FY 2019 Phase II cycle. (Updated 10/4/2017)

Performance Management

Q: Will historical performance evaluations currently housed in PATH be available in Workday?
A: There will not be an integration with PeopleAdmin (PATH). TAMU is currently working on what the historical access to PATH data will be for evaluations. At this time, historical evaluations will be available upon request to the Central HR Office for specific evaluations, if departments have not taken steps to print the PATH evaluations and saved them to their departmental personnel files.

Q: Will PATH go away in December?
A: Employee information will be transferred to Workday, however, historical evaluations will not transfer to Workday. You will complete current year evaluations in PATH, however goals for next year will be entered into Workday once it goes live in December 2017. You may record the current years goals locally on this paper form that can be uploaded to Workday after go live:
http://employees.tamu.edu/media/1318455/Performance_goals_next_review.docx
(Updated 9/18/2017)

Q: Will Workday's Performance Management Module require each duty to be listed, and then evaluated? (9/18/2017)
A: For the performance evaluation of most staff positions below the level of Director, each of the listed responsibilities in Workday can be given a rating, but Workday will not *require* a rating on each.

Q: How do we handle the current year's performance goals since we can't enter them into PATH? (9/18/2017)
A: Current year's performance goals should still be managed locally for future loading into Workday. Paper form that can be used to document goals is available here:
http://employees.tamu.edu/media/1318455/Performance_goals_next_review.docx

Q: Why is Classification & Compensation asking us to condense/consolidate my position descriptions? (9/18/2017)
A: We needed to limit the number of duty sections in order to have the best chance of success for moving over the information with the fewest errors. Therefore the top 15 sections of duties will come over to Workday on the responsibilities section of the qualifications tab. TAMU only has a few PDs (less than 20) with more than 15 sections of duties and we will be reaching out to those departments this month about how to consolidate.

Security/Roles

Q: Will SSNs be kept / available in the cloud? Who will have access? What are the security measures to prevent hackers from accessing the data stored on the cloud?
A: SSNs are in the cloud because they are part of the employee record. SSNs are only visible to those with security roles that allow them to see them. Workday has strong security measures to prevent data intrusion. More information can be found on Workday Date Protection in the Cloud by visiting:

http://employees.tamu.edu/workday/ and selecting the "Workday Data Protection in the Cloud" dropdown for more information. (Updated 9/18/2017)

Q: Will the Executive Approver role be delegated from the Provost to the college Assistant Deans? (9/18/2017)
A: The Provost has agreed to delegate this role to the assistant deans in the colleges, provided Mr. Pettibon is able to retain access to view records from the colleges.

- Mr. Pettibon will continue to handle the non-colleges in Academic Affairs.
- It may still be necessary to route to the Provost office via paper on select tasks, as appropriate.
- Other Vice Presidents will serve as Executive Approvers for their divisions, still to be determined.

Q: How much employee history will be rolling forward? That is, how much history relating to historical titles will roll forward?
A: Original hire dates will roll forward, however, your title history (changes in title over the years) will not be converted to Workday.

Q: Will there be a glossary for Liaisons?
A: Yes the Workday project will release one prior to go live in December and will include some crosswalk information on the Workday project website. However, there are currently several "terminology" help documents that we already have available, such as a TAMUS to Workday Terminology help document. This document can be found at: http://employees.tamu.edu/media/1325689/WorkdayTerminology.pdf (Updated 9/18/2017)

Q: How will delegations work?
A: Individuals will be able to delegate most tasks to other individuals. This delegation will remain, until changed or for up to a year. Delegations will need to be updated annually. There will be some functions that cannot be delegated, such as the assignment of merit. This will be a culture change for us as Workday truly works off of the organizational chart and structure. In almost all cases and business processes (BPs) in Workday there are multiple individuals that can start a process and approve a process. (Updated 9/18/2017)

Q: My dept. head wants to approve bi-weekly payroll before its submitted. What suggestions do you have for handling this? (9/18/2017)
A: Here's a possible solution*:

- The bi-weekly employee submits their hours and emails their manager with a screen shot of their Workday timecard.
- The manager reviews the email and forwards the email with their OK to the department head.
- The department head is mapped to the Timekeeper role in Workday and submits the timesheet.
- The timesheet then routes directly to Payroll for processing.
- All parties need to be aware of, and adhere to, the due dates/times!

*Best Practice: DH's allow managers to handle

Extended Pay Plan

Q: How many faculty are currently utilizing the EPP Program?

A: 356 TAMU faculty and approximately 1600 system-wide faculty are currently utilizing EPP.

Q: How does the Workday plan differ from EPP?
A: The A&M System has created a new plan called Save for Summer. Key differences include: Save for Summer will hold back a flat dollar amount of net pay compared to a percentage held back under EPP, and your current balance will be on your payslip compared to needing to check with your local Payroll Office. SFS will only hold back a portion of annual insurance premiums through May 2018.

Q: Can the system that distributes 12 months of insurance premiums over nine months for the EPP also be used to distribute the annual premiums over 9 months for faculty that are not participating in the EPP?
A: Yes, beginning Sept 1, 2018, anyone working fewer than 12 months will have 12 months of insurance premiums deducted from the 9 paychecks between October and June.

Q: If an individual that is participating in the EPP who has their insurance premiums deducted over 9 months leaves the university, say in June, will they get their insurance premiums returned to them that were paid for the summer over the first 9 months of the FY? How will this occur?
A: Yes. This is the same as it is today – if someone leaves before 8/31, anything held back is refunded.