OCTOBER 2025 WORKDAY HCM CoP MEETING

UNIVERSITY *of* WASHINGTON

AGENDA

> What to Know About HR Orgs – Rachel Gatlin (UWHR)
> Academic Census Reports and Cleanup Activity – Rachel Gatlin (UWHR)
> Coming Soon: Open Enrollment – Sheri Goong (UWHR)
> Additional Compensation Dos and Don'ts – Kara Garcia (OPF)
> Workday Recruiting Updates – Kathleen Farrell (UWHR)

HR HIERARCHY & CENSUS DATA UPDATE

RACHEL GATLIN - ASSISTANT VP, HRIS

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What Is the HR Hierarchy (1 OF 2)

History:

- The Finance Organization Code (Fin Org) structure served as the original HR institutional reporting structure.
- When Finance transitioned to the Workday, HR needed a dedicated structure.
- HR required an independent structure for accurate reporting.
- Early prototypes tested Supervisory Orgs; they did not always uniformly represent reporting information.

What Is the HR Hierarchy (2 OF 2)

History cont:

- Challenges included repetitive names, ragged hierarchy levels, business process relationships vs reporting relationships and UW Medicine alignment.
- Collaboration with all major units and HRDDC finalized the model.
- Now a Workday HCM data element, governed by UWHR and maintained by HRIS.

What Is the HR Hierarchy

- One of **five structures** forming UW's hierarchy:
  - HR Hierarchy (Reporting Relationships)
  - Institutional Org Structure (IOS)
  - Workday Financial Data Model (FDM) - Cost Center and Company Hierarchy
  - Workday Academic Hierarchy
  - Workday Supervisory Organization Hierarchy.

Where to See it In Workday

- Located on Supervisory Organization → Organization Assignments
- Also located on the Position → Organization Assignments
- Displays default Organization Type: HR Org.
- Viewable with custom organization access.
- If incorrect, do not edit directly — contact hris@uw.edu

HR Partner/WD Roles Responsibilities

- Observe only – do not modify or remove HR Hierarchy assignments.
- Notify HRIS when new units are created, renamed, or closed.
- Report errors or mismatches.
- HRIS does payroll-based maintenance and may reach out for additional information.
- HRIS conducts semi-annual audits (January & June) and may reach out for clarity/confirmation.

What Is the Census?

The Academic Personnel (AP) Census is the official annual snapshot of academic appointment and position data in Workday.

Data captured in the AP Census is used to develop key institutional and national reports, including:

> IPEDS (Integrated Postsecondary Education Data System)
> AAUP Faculty Salary Survey
> APF Fact Sheet
> Faculty Dashboard

Why It's Important

Ensures UW's **faculty, academic appointment, and salary data** are reported **accurately** to internal and external entities.

Inaccurate data can cause:

> Misreported headcounts and compensation.

> Errors in national reports and dashboards.

> Delays or corrections in reports.

Action Needed

Run Reports by October 31

- Run **R0716.1 – Academic Appointment Issues**
- Run **R0716.2 – Academic Position Issues**
- Review for your **Supervisory Organizations** and use report columns to identify required fixes.

Fix Issues Now

- Complete all updates and approvals **before October 31**.
- Continue running the reports until **no issues remain**.

HR HIERARCHY/CENSUS Q&A (1 OF 3)

- Where in Workday can you find the HR Hierarchy information in an employee's profile?
  - It's by the position, not by the worker – if you go into the position, you'll find the HR org assignments there.

HR HIERARCHY/CENSUS Q&A (2 OF 3)

- What is the purpose of the HR Hierarchy and how does it impact us in terms of structure and data?
  - The purpose is to create a uniform HR organizational structure that we can use for HR reporting. And it also then maps to our institutional org structure, so that we can, in places like institutional analysis, or in other cross-functional analytical spaces, look across all the domains, so the student domain, the space domain, the finance domain, and the HR domain. We have uniform language as we do reports. So each hierarchy then maps to that iOS to create a uniform structure for reports that go to places like the Regents or other institutional-level reporting. So the HR one specifically is for us to look at how reporting relationships exist. Then we map that to the institutional one so that we can look across all domains and be talking when we say Department of X, it means the same thing in all the spaces. But it gives us the freedom within each of our individual domains to determine how that is…rolled up. So, in some cases, we would roll very low. In other cases, we would keep it at what we would call Level 3, which in, org code days was major orgs, if you recall those, those three-digit major orgs. So we were not replicating org code, it is not replicating, but we did start there, and then it has evolved. Now it's been in production for 2 years, so it has evolved and become truly representation of reporting relationships.

HR HIERARCHY/CENSUS Q&A (3 OF 3)

> When was the last time the two reports were reviewed compared to Census data errors? My recollection is that when units receive their version of the required corrections, there are often errors that pop up, which didn't appears on the reports.
  - We are researching as we have had several errors reports with the reports and they may need refinement.
> How do I get access to run the report? It does not show in Workday for me to run.
  - You'll need to have one of the following Workday Security Roles to run R0716.2/R0716.2: Academic Chair/Chair's Delegate, Academic Dean/Dean's Delegate, Academic Partner, HCM Initiate 2.

OPEN ENROLLMENT

Sheri Goong - Assistant Director, Benefits (UWHR)

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WHAT TO KNOW

- Open Enrollment runs from October 27th through November 24th
- What can employees do?
  - Enroll in or change medical, dental and/or vision plans
  - Add qualified dependents
  - Remove dependents
  - Enroll/Re-enroll in an FSA, LFSA, or DCAP for 2026
  - Update your spousal premium surcharge response

MEDICAL PLAN CHANGES

- UMP Plus-Puget Sound High Value Network (PSHVN) and UMP Plus-UW Medicine Accountable Care Network (CAN) Plans will no longer be offered
  - Employees must choose a new plan during Open Enrollment or default into the UMP Classic Plan
- CDHPs
  - The IRS raised the deductible for Consumer-directed health plans to $1,700 for single subscribers/$3,400 for families

FSA AND DCAP LIMIT INCREASES

- FSA and LFSA – $3,300 Limit for 2026
- DCAP – NEW $7,500 Limit for 2026

HOW TO PREPARE

- **Verify Your Address in Workday:** Before November rolls around, make sure your home address is current.
- **Prepare Your Dependent Verification *Before* Open Enrollment Starts:** If you are planning on adding dependents (such as your spouse or a child), check out this list of what qualifies as valid dependent verification.
- **Research Health Plans Now:** Compare plans and explore benefit options before Open Enrollment starts by visiting our resources at the end.
- Check your UW email throughout the Open Enrollment period! UW email is the primary method for important OE notifications and how the Benefits Office will contact employees if action is required.

BENEFIT FAIRS

- PEBB eligible employees should be encouraged to attend an on-campus Benefits Fair: https://hr.uw.edu/benefits/open-enrollment/benefits-fairs/
  - Harborview Medical Center
    - Monday, October 20
  - University of Washington – Husky Union Building
    - Tuesday, October 21
  - UW Medical Center – Montlake and Health Sciences
    - Wednesday, October 22
  - UW Medical Center – Northwest
    - Thursday, October 23

ADDITIONAL RESOURCES

- UWHR Open Enrollment Page: https://hr.uw.edu/benefits/open-enrollment/overview/
- On-site Benefits Support for Open Enrollment
  - UW Benefits will be on site 8:30-4:30 (except Nov. 4 below) to provide in-person assistance
    - Magnuson Health Sciences Center, Lobby : Nov. 4 (9am-4pm)
    - Harborview, Research Training Building, 1st floor: Nov. 5
    - Northwest Hospital, Medical Arts Building (MAB) 112: Nov. 12
    - Facilities Service Training Academy: Nov. 13

OPEN ENROLLMENT Q&A (1 OF 4)

- If you do not need to make any changes - do you have to take action or will everything role over the same?
  - If you are happy with your current elections – or if you are a UMP Plus subscriber and you want to be automatically enrolled in the UMP Classic plan – you don't need to complete Open Enrollment. Your current elections will carry forward into 2026. Please note two important exceptions: 1) All employees who want to participate in a Medical FSA, Limited Purpose FSA or the DCAP must enroll/reenroll each year during Open Enrollment. 2) If you cover your spouse/partner on your medical plan, you may need to answer whether or not the $50 per month spousal premium surcharge applies to you.

OPEN ENROLLMENT Q&A (2 OF 4)

- What about life insurance changes?
  - You can enroll in, waive or increase your optional life insurance through MetLife at any time. However, you'll be subject to evidence of insurability (proof of good health) if you are enrolling or increasing your coverage more than 31 days after your initial eligibility date. For more information, including how to enroll, visit the Life Insurance and Accidental Death and Dismemberment Insurance page.

OPEN ENROLLMENT Q&A (3 OF 4)

- Will that spousal surcharge notification come through Workday or email?
  - It will be a Workday notification that will be delivered to the employee's NetID@uw.edu email address. The first reminder will go out November 4, 2025. Individuals who need to attest will also find a Workday Announcement on their Workday home screen reminding them to take action.
- For Tacoma employees, would the online be the best option?
  - The HCA hosts other Benefits Fairs; to find a location near you, visit the HCA's Benefits Fairs page.

OPEN ENROLLMENT Q&A (4 OF 4)

- Is there a handout that could be printed?
  - Not a handout, but we recommend everyone start on the Open Enrollment Overview page, which provides comprehensive information as well as links to other resources. You can also attend one of the following Open Enrollment information sessions to meet with UW Benefits Specialists:
    - **Nov. 4** (9:00am – 4:00pm): Magnuson Health Sciences Center, Lobby
    - **Nov. 5** (8:30am – 4:30pm): Harborview Medical Center Research and Training Building, 1st floor outside of auditorium
    - **Nov. 12** (8:30am – 4:30pm): Northwest Hospital Medical Arts Building, Computer Classroom
    - **Nov. 13** (8:30am – 4:30pm): Facilities Service Training Academy

ADDITIONAL COMPENSTION

Kara Garcia - Assistant Director, Faculty Affairs Operations (APF)

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TEMPORARY PAY SUPPLEMENT (TPS)

Temporary Pay Supplement (TPS) key features:

- Appropriate for temporary duties that cannot be accommodated through a workload adjustment, including overload teaching, overload service not eligible for an ADS, project-based work, and temporary supervisory or leadership duties that do not require Board of Regents approval.
- Subject to EO59 and 25% monthly compensation threshold.
- Functions similarly to TPI on the staff side.
- Requires a compensation start and end date in Workday; end date limited to two years out.
- Can be renewed/extended.
- Approved by dean/chancellor unless individual is over monthly threshold.

AUDITOR REVIEW & REMINDERS

- **25% threshold is per month, no per request, and calculated based on monthly base pay (i.e., base pay x FTE).**
- Requests need to be approved **before work begins**.
- Recommend initiating Workday business process **at least a month in advance**.
- Compensation for summer for those on a 9-month service period should be compensated first through FTE. You should not process additional compensation until the individual's FTE has been fully leveraged. If their summer effort exceeds the 25% threshold, it will route to APF for review and approval so needs **at least a month in advance** submission.

AUDITOR REVIEW & REMINDERS (1 OF 2)

- Additional compensation items pulled out for audit review were transactions “under the 25% threshold” rule in which approval stopped at the dean's offices; thus, these cases did not reach APF for comment or notice that the payment was after work had begun.” EO59 calls for these items to still be approved **before work begins** even though they are approved within the school/dean’s office. The auditors will be pulling all types of additional compensation transactions including those approved inside of the schools.

AUDITOR REVIEW & REMINDERS (2 OF 2)

Use the Workday Notes section to include all the questions listed on the Additional Compensation page, including:

- Have you confirmed that this type of compensation is appropriate?
- Briefly describe the nature of work associated with this request.
- Briefly describe why this couldn't be accommodated through workload adjustment as defined in policy.
- Were the terms of assignment agreed to by the employee?
- If the request exceeds the 25% monthly threshold set by Executive Order 59, please provide rationale and how **compensation calculation** was arrived at for the employee.

ADDITIONAL COMP Q&A (1 OF 2)

- How do we enter TPI/TSI that is below minimum of 5% of the employee’s current salary?
  - TPIs/TSIs must be at least five percent of the employee’s base salary.
- We can’t pay them until the work is complete. How do we reconcile these two different instructions? (For research projects)
  - If a contract is project- or results-oriented, and the additional compensation is over the 25% threshold, you’d need to include that in the Notes section. But in general, people are supposed to be paid at the time they’re performing work, so this should be rare.

ADDITIONAL COMP Q&A (2 OF 2)

- For lecturers part-time multi-year, during the academic year, should we use FTE for additional compensation or should we enter a TPS?
  - It would depend on the type of work they're doing – we'd want to know their position, FTE, if they're stacking up TPS for various reasons, etc. Basically, this would be a case-by-case scenario – please feel free to reach out to acadpers@uw.edu to discuss the particulars and how to do this accurately.
- When you mentioned the calculation, were you referring to the actual amount, the percentage, or both?
  - Base pay x FTE is the monthly amount, and then it's going to look at what you entered for TPS and it's going to route based on if it's above or below 25%.

WORKDAY RECRUITING REVIEW

Kathleen Farrell - Director, Campus Recruiting (UWHR)

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CONFIDENTIAL REQUISITION REVIEW

Confidential REQs are used to:

> Direct hire identified finalists for nonpermanent, intermittent, or professional staff temporary positions.
> Initiate a campus-wide candidate banks recruitment for Fiscal Specialist 2, Budget/Fiscal Analyst, and Shared Services Specialist job profiles.
> Initiate a hire when a search waiver has been approved by the Equal Opportunity and Affirmative Action Office.

REQ REASON: COMPETITIVE VS. NONCOMPETITIVE

Use the “Noncompetitive” reason in these scenarios, otherwise use “Competitive:

> Direct hiring an identified finalist (confidential requisition).
> Moving a worker between sup orgs or moving a competitively hired nonpermanent employee to a regular position (standard requisition).
> Initiating a hire when a search waiver has been approved by EOAA.

JOB POSTING TEXT

For standard and confidential job REQs:

- Complete the Job Posting Text field.
- It is ok to cut-and-paste the job description, but do NOT cut-and-paste the Professional Staff Position Description form.
- See Job posting components - Total Talent Management for assistance.

CREATE REQ JOB AIDS

- Create Job Requisition - STaff Campus | Employee Workday Help
- Requisition types and Create Requisition process changes - Total Talent Management
- **NEW!** Direct hire process - campus staff - Total Talent Management

WORKDAY RECRUITING Q&A (1 OF 4)

- Can I still use my old PD that I had in the old system to create a confidential REQ?
  - Yes. The confidential req BP will always create a new PN. If you want to backfill an “old” PN, please include the number in the BP comments.
- Can this confidential REQ also be used to add job for an intermittent employee?
  - Yes. If somebody has a regular position and you're adding an intermittent position for them, a confidential req is great for that. Additionally, if somebody is currently an intermittent employee and is adding another job type, if that other job type is temporary, then again, a confidential requisition is great.

WORKDAY RECRUITING Q&A (2 OF 4)

- For one of those candidate banks profiles, do we have the option to not use the Conf. Req?
  - No. If you have an applicant who you're really excited about, have them apply to the candidate bank – many departments do that and it's worked out well.
- Can you speak to the difference again between putting recruiting-new position, or using backfill? For example, if we are creating a REQ from an existing JD does that mean it will be backfill even if no one has been in it? I would think that using recruiting new position is if you're creating the position at the same time you're submitting the Job REQ.
  - You will use "backfill" if the PN has an incumbent.
  - If the position has never been filled, it is a new position – even if it was created several months ago but remained vacant.

WORKDAY RECRUITING Q&A (3 OF 4)

- Has there been a fix regarding updating staff from E to NE upon hire if their salary does not meet the threshold? We are encountering issues with staff not having access to their timecard – I know there was a way to address this when moving the hire from UWHires to Workday, so hoping there is fix in progress for this new workday recruiting update.
  - We are indeed planning to have some validations to prevent exactly this from happening – hopefully soon!
- When is the next deep dive for direct hires?
  - We're currently working on a deep dive on using information in the Job Application business process history to track your hiring activities. But we'll try to schedule another deep dive on Direct Hires soon!

WORKDAY RECRUITING Q&A (4 OF 4)

- What situation would create a situation where we would need to create a noncompetitive hire to move a staff employee to a different sup org, rather than use "move worker" to move them into a different sup org?
  - Move Worker can only be used when the job change is within a Sup Org (ex: SOM to SOM). You would need to initiate a Job Change if it was a move to a different Sup org (ex: SOM to CAS).

THANK YOU!