Good morning HCM Action Initiators (HCMAI),

This newsletter is designed to share information and provide assistance for Workday HCM processes, processing timelines, frequently asked questions, tidbits and other information. The SU Workday HCM Training Resources webpage is filled with valuable reference materials and information necessary to ensure successful HCM transaction processing. Please bookmark this page for quick reference.

We have also launched a new **Human Resources and Payroll ticket system** which will allow you to quickly and directly submit questions or requests for assistance. Fully utilizing this new ticket system, in lieu of multiple phone calls, emails, or IMs, will allow your need to be appropriately routed for efficient processing. It will also provide metrics to be used to identify trends and track response time. To access go to the Technology Resource Center and click the "More" down arrow to display the additional portals, one of which is the **Human Resources and Payroll Service Center**. Please complete the JIRA ticket and submit for a specific topic/question/issue. If you have a subsequent additional, unrelated topic/question/issue, please submit a new ticket. Based on the topic and type of request, it will be routed to the appropriate HR or Payroll staff member.

Escalation Steps for HR and Payroll related challenges or concerns:
1. Submit challenges or concerns to HR or Payroll via the online ticket system. Any issues related to HR or Payroll should first be directed to the HR or Payroll ticket system. These offices are your primary resources for resolving matters, as they handle the day-to-day operations and are best equipped to provide immediate assistance.

2. If needed, escalate to Wendy Ringling (Director of HR Operations), Laurie Stroud (Payroll Manager), and/or Tara Smith (Director of Academic Affairs Operations), if the issue is not resolved at the office team level.
   a. Wendy oversees HR operations and can address unresolved HR matters.
   b. Laurie oversees Payroll operations and can handle unresolved payroll issues.
   c. Tara provides additional support for Academic Affairs in this stage of escalation.

3. Escalate to Tina Boyd (Interim AVP of HR), Lynn Adkins (AVP of Financial Services), and/or Jessica Clark (Associate Provost). If the matter remains unresolved after step 2 has been completed, it should be escalated to Tina, Lynn or Jessica. This is third step of escalation points, but their involvement should only occur if all prior steps fail.

Skipping steps in the escalation process and going directly to cabinet members (Vice Presidents) can be counterproductive. Cabinet members like Aurora Edenhart-Pepe (VP of Admin & Finance) and Provost Couch are not involved in the daily management of HR and payroll operations. They rely on the chain of command to ensure issues are addressed by the individuals best equipped to handle them before stepping in to resolve escalated matters.

We hope this helps with understanding the problem-solving process and how it should be followed going forward.

<u>**Process Updates**</u>

Grant and GA/RA/TA contract processing and access for the grants and Graduate Office is underway. We met just before winter break and explored some potential opportunities to improve access for these two employment transactions. More to come as we work through the solution. In the meantime, the HCMAI responsible for processing transactions for the supervisory organization the grant or graduate works within will continue to be responsible for processing the required transactions.

Employment transactions:
- Continue to be processed by the **"home" supervisory organization** HCMAI as the primary processing support for the employee's primary job. The only time an action is processed under a separate supervisory organization is when the transaction is determined to be an additional job and not similar or related to the current primary job. Please reference and use the **"Period Activity Pay (PAP) Intake Form"** located on the SU HCM Training Resources webpage to assist with these tasks.
  - o For faculty, nearly all transactions are considered to fall under their primary faculty role. Exceptions include, but are not limited to, athletic contracts and summer adjunct contracts which are considered additional jobs with different employment type characteristics (like Adjunct or Fixed Term Temporary (CI).
  - o For staff and student workers, most secondary work is considered an additional job.

  Maintaining the consistency of primary and additional job is very important to the processing, reporting, renewing activities within Workday. If actions are not processed consistently and accurately, then the subsequent processes, like reporting, do not provide the necessary information needed to make good workforce decisions or accurate third-party reporting.

- Transactions should be **effective on the first day of a payroll period**. If you have a new hire for which the hiring manager is requesting a start date other than the first day of a payroll period, please contact the HR Office for guidance. It has been noted hires beginning in the second week of a payroll period have not been processed or paid timely.
  - o In order to effectively process a direct hire, the HCMAI will need **basic information (mailing and email address, SSN, DOB, etc.) regarding the incoming employee** in order to begin the transaction. Please note a **signed and accepted offer letter and Personnel Requisition Form (PRF)** are required to be uploaded as step 1 of the direct hire process.
  - o It is the **responsibility of the HCMAI** to ensure the incoming employee completes the onboarding tasks and follows-up with the employee to ensure they have visited the HR Office to complete the necessary pre-employment actions and paperwork (e.g. fingerprint process, I-9 by first day of employment, Direct Deposit Form, and tax forms). Please communicate these process steps to the incoming employee and maintain contact with them throughout the onboarding process.

- When entering a direct hire, please ensure to run the **"Find Former Workers - SU"** report to determine if a prior employee id has been assigned. While they may not have been employed previously, if they applied as a student at SU, they may have been assigned an Empl ID.

- Costing allocations for contractual positions have been experiencing processing challenges. Please refer to the **SU Costing Allocation Job Aid Supplement** for detailed information. It is imperative the costing information assigned to the transaction is accurate to ensure proper

expense reporting for financial statements. Also, please note if the home HCMAI enters the information with costing codes for another area, the budget approval step will go to the appropriate approver in the other area and not the home supervisor organization budget administrator.

We welcome your **feedback** to humanresources@salisbury.edu as we move through the implementation stabilization phase. Additionally, if there is a specific topic you would like included, please email it to humanresources@salisbury.edu and we will work those into the next edition.

For information on required **training**, types of training, what's changing and more, visit the official Workday project website.

If you have any questions or I can be of further assistance, please let me know.

Thank you,
Wendy

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