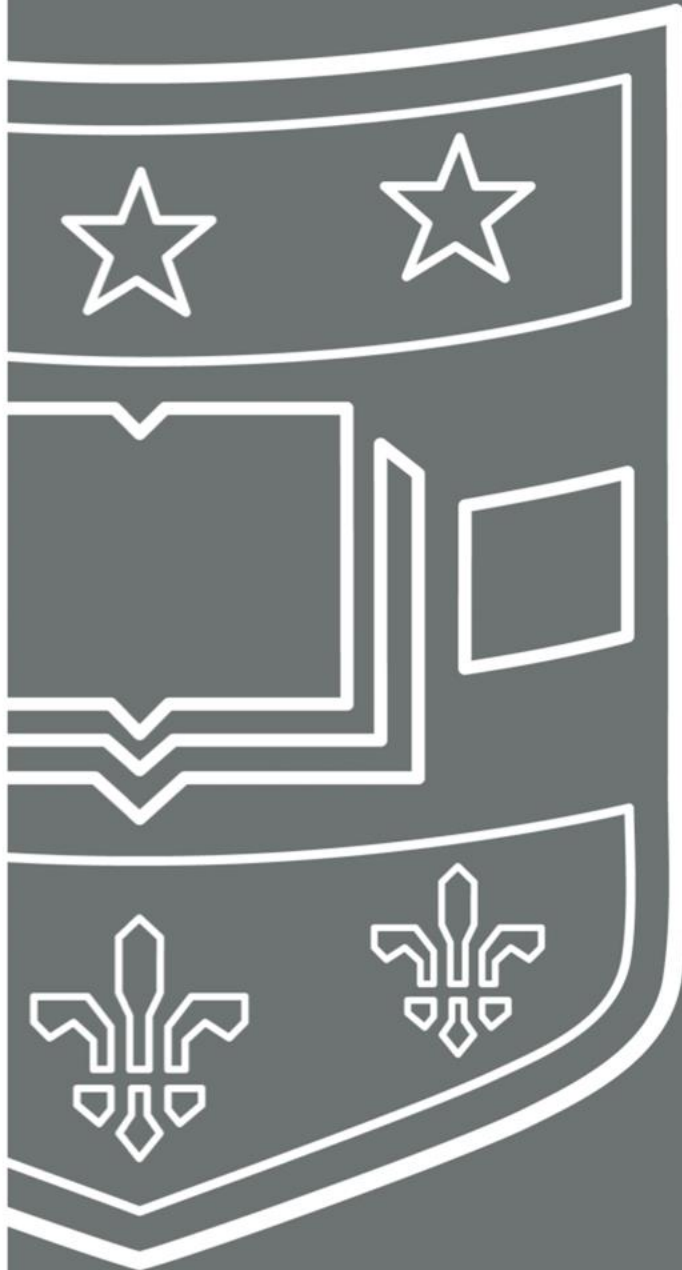




Workday@WashU

Welcome to Workday Orientation





Agenda:

- ❑ Introduction
 - ❑ Session Expectations
 - ❑ Meet the Trainers
- ❑ Workday New User Training
 - ❑ Workday Help – Where to find it
 - ❑ Common Questions
 - Change Personal Information/ Health and Retirement Benefits/ Viewing your Pay and Withholdings/ Direct Deposit/ Payroll Dates/ Time Tracking/ Entering Absences/ Onboarding/ Vaccine / FY24 Close
- ❑ Contacts and Survey
- ❑ Questions and Answers Session



Session Expectations



Remain muted until Q&A breaks. You can stay off camera.



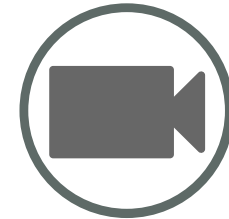
Ask questions in **chat** to help us with future training



This presentation will be shared with you after the training for your reference



Zoom name is being used to mark attendance. If Zoom name is not accurate, please drop your name in chat.



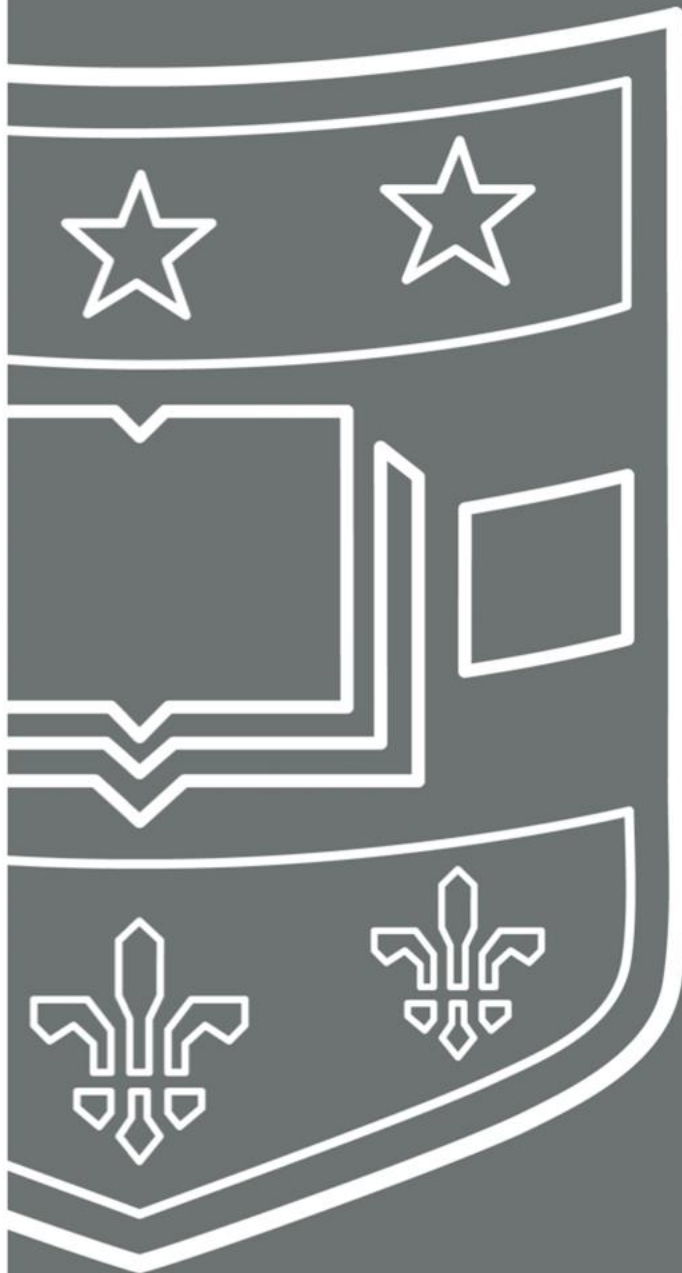
Session is being recorded for internal purposes.



Training Team

Workday@WashU

Today's Presenters	Tier 1 Workday Support Desk
Charles Anderson	Application Support Specialist II
Stephanie Philipps	Application Support Specialist II



Workday Help

Where can I get help?

- The Workday Help Desk
- One.Wustl - portal
- Workday@WashU (workday.wustl.edu)
 - Self-help site
 - Searchable
- Sidekick

Workday@WashU



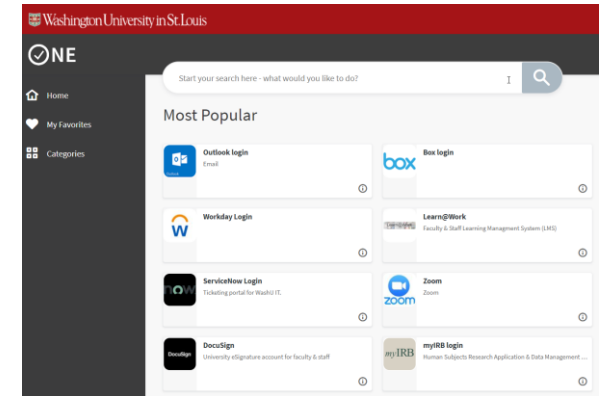
❑ Workday Help Desk:

- ❑ What is the Help Desk?
- ❑ What do they do?

❑ one.wustl.edu: portal that gives you a quick and easy shortcut to university services and systems

❑ [Workday@WashU \(workday.wustl.edu\)](https://workday.wustl.edu) - **Please bookmark this site** – On-demand training for help completing tasks in Workday

- ❑ Self Service Help
- ❑ News/Updates
- ❑ Alerts!



Workday is WashU's system for human resources and finance, including employee and manager self-service.

Consider this website your source of truth as we update with the latest information and training. We highly recommend bookmarking rather than printing materials to ensure you always have the latest, most accurate information.

[Learn more about Workday at WashU](#)

RESOLVED: Workday@WashU Performance Issues – May 13, 2024

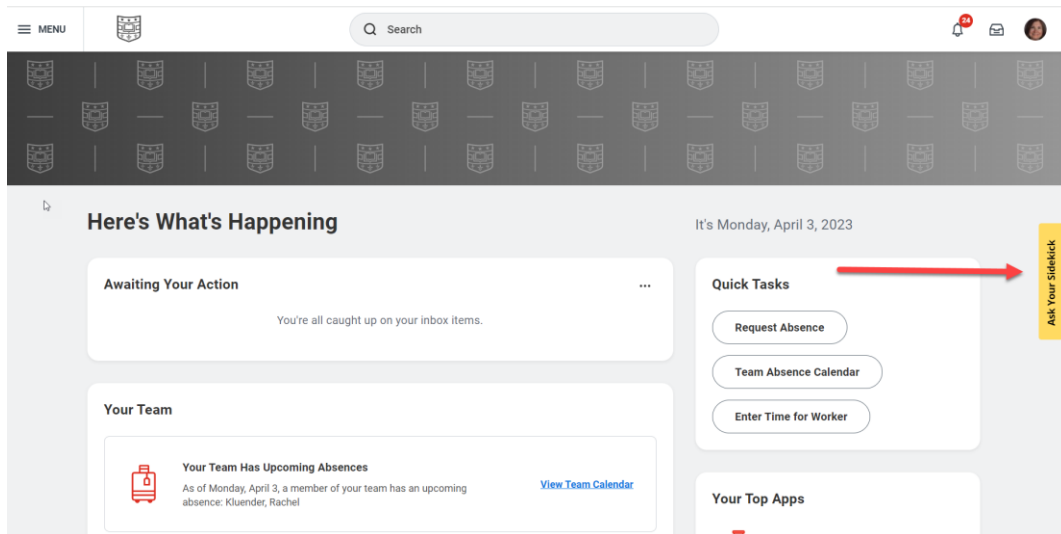
UPDATE: The performance issues have been resolved. Support teams will continue to monitor.

Workday@WashU (<https://workday.wustl.edu/>) searches and web pages are currently experiencing slow response times. WashU support teams are currently investigating. Workday performance is not impacted.

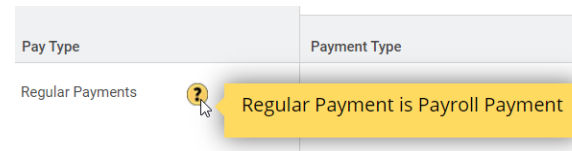


☐ Help Inside Workday

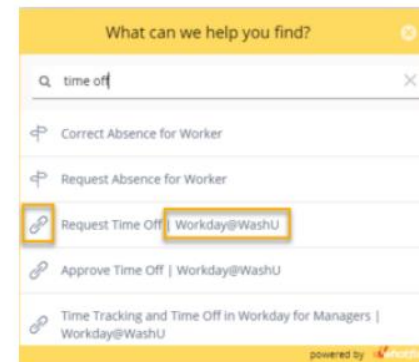
- ☐ Use Your Sidekick – (yellow tab on the side in Workday, yellow question marks, yellow pop-ups)
 - ☐ Firefox issues – Chrome, Edge, or Safari is recommended
 - ☐ If the yellow tab is not on the right-hand side when you log in to workday, you can install it. More info and installation instructions can be found on the [Your Sidekick](#) page.



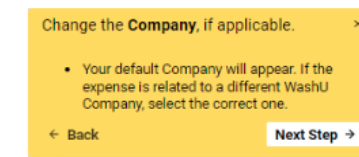
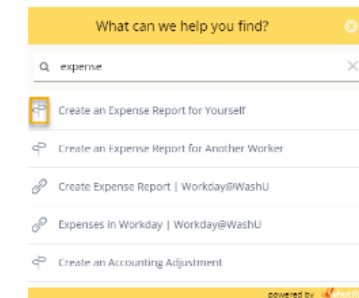
Smart Tips ?



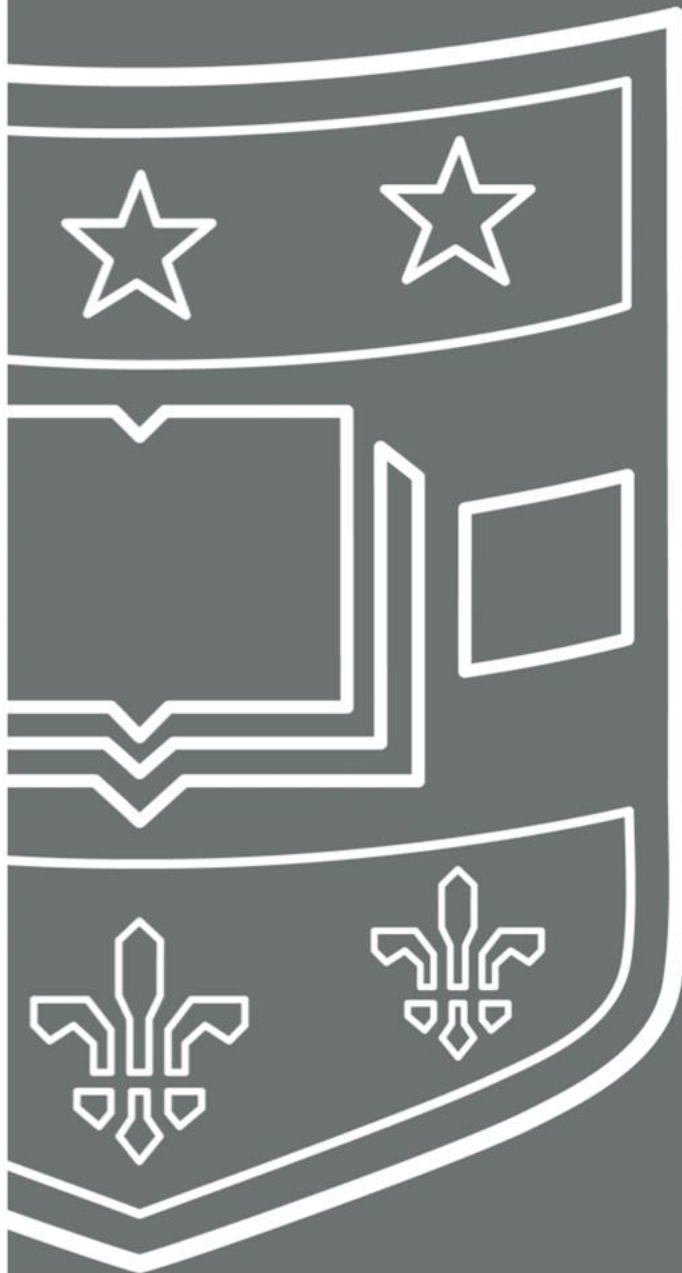
Links to Support Materials



Walkthroughs



Ask Your Sidekick



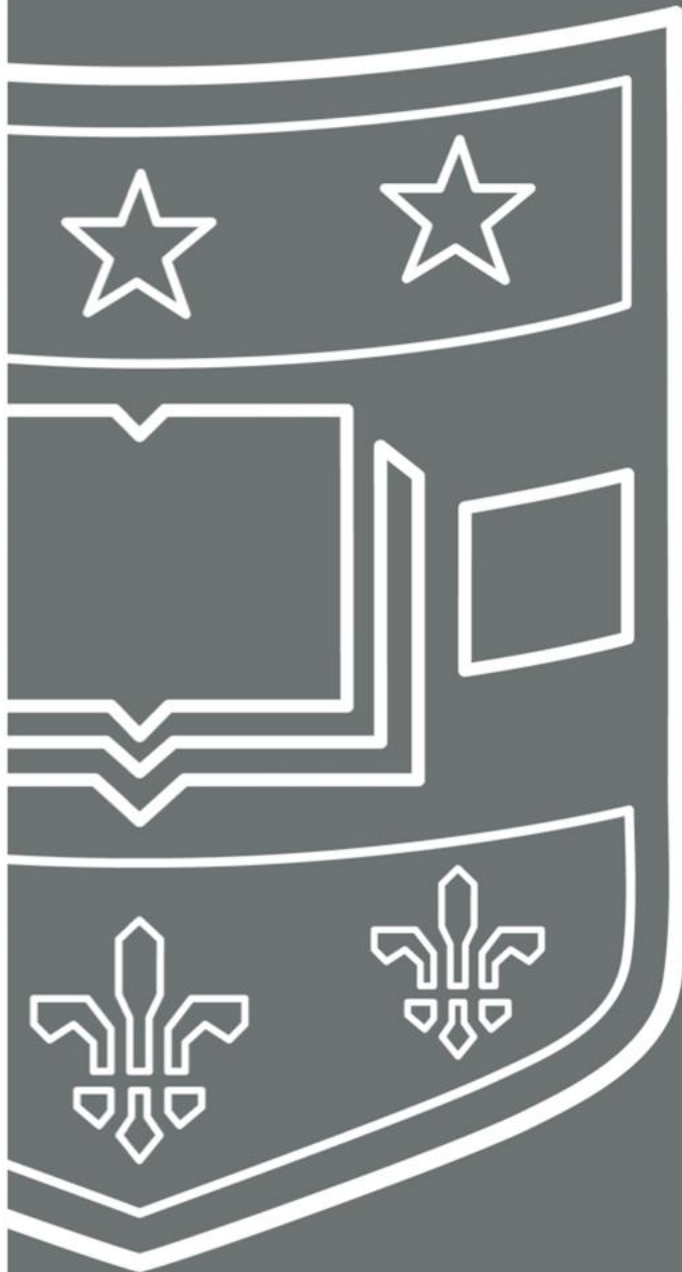
Workday Help:

Q & A Break

What questions do you have about:

- One.Wustl (shortcut portal)?
- Workday@WashU self-help site?
- Sidekick in-system guidance?

(Info on how to contact the help desk will be provided in a later slide)



Common Questions Using Workday:

- Health Benefits
- Retirement
- Change Personal Information
- Benefit and Pay Hub** which includes
 - Viewing your pay and withholdings
 - Adding Beneficiaries
 - Direct Deposit
- Payroll Dates
- Time Tracking
- Entering Absences
- Onboarding and Vaccine Step
- FY24 Close



Common Questions: Benefits

Health:

- You have 30 days to sign up from hire date
- No matter your hire date, everyone will need to enroll during Open Enrollment at the beginning of November each year. You will get a task in Workday to complete this. [Benefits Open Enrollment Reference Guide](#)

Awaiting Your Action



Open Enrollment Change: Middleton, Katherine Sue on 01/01/2024
My Tasks - 2 day(s) ago

- If you are a new hire, the [Faculty/Staff 2024 Benefits Guide](#) will breakdown costs for each plan
- For help choosing a health plan, use the in-system help counselor, [alex](#)

Benefits Office:

HR-BenefitsMail@wustl.edu or

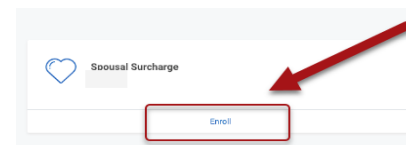
Benefits Helpdesk at 314-935-2332

[HR Benefits Website](#)



Spousal Surcharge:

- If you elected a health care plan, you **must enroll** in Spousal Surcharge to **manage** elections – EVEN IF YOU DO NOT NEED SPOUSAL COVERAGE OR ARE NOT MARRIED



Plans Available

Select a plan or Waive to opt out of Spousal Surcharge. The displayed cost of waived plans assumes coverage for Individual Only. Workday displays the cost for a waived plan only if it offers Individual Only coverage.

*Selection	Benefit Plan Details	You Pay (Monthly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Washington University	

Note: If you make less than \$50,000, you will not be required to pay the surcharge even if you cover your spouse/domestic partner.

- Option 1**
No, the spousal/partner surcharge does NOT apply to me.
- Option 2**
Yes, the spousal surcharge applies to me because my spouse is enrolled in WashU coverage and has access to other health insurance through their employer.
- Option 3**
Yes, the partner surcharge applies to me because my domestic partner is enrolled in WashU coverage and has access to other health insurance through their employer.

*Spousal Surcharge Plan

Faculty and Staff eligible for full-time health rates through the university (not including Union Power Plant) who enroll in health insurance **must** enroll in the Spousal Surcharge Plan, whether you are covering a spouse or domestic partner or not. **Only employees who are not enrolling in a health plan can waive the spousal surcharge plan.** See the chart below to explain the enrollment options.



Retirement Savings Account: Your Portion

- Not all employees are retirement eligible - *Excludes student workers and nonresident aliens*
- Who is TIAA - www.tiaa.org
- New employees need to wait for an email from TIAA (usually within 10 days after both the hire date and completion of I-9).
- 5% auto-enroll; You have 30 days to opt out of the automatic enrollment feature.
- If you are automatically enrolled at the minimum, you will also be enrolled in the automatic increase feature, which increases your pre-tax contribution by 1% annually; capped at 15%. You may change or opt out of this feature at any time.
- You may change your contribution election at any time by logging into you TIAA account

[HR Retirement Savings Page](#)

Benefits Office:

HR-BenefitsMail@wustl.edu or
Benefits Helpdesk at 314-935-2332

[HR Benefits Website](#)



Retirement Savings Account: Wash U Contribution



- WashU makes contributions to all employees who contribute 5% or more into their TIAA retirement savings account (7-10% depending on length of service) - This starts as soon as you start contributing (no waiting period)**
- Vesting period for Wash U's portion is 3 years
- You are always 100% vested in your own contributions.
- Can make retirement changes throughout the year; no limit on number of changes.
- It is possible to qualify for Recognition of Service with Prior Employer for vesting and tuition benefit eligibility, please refer to [this document](#) for more details

- [HR Retirement Savings Page](#)

Benefits Office:

HR-BenefitsMail@wustl.edu or
Benefits Helpdesk at 314-935-2332

[HR Benefits Website](#)



Edit Personal Information

or

Q Kate Middleton

Kate Middleton
Workday Queen | Workday Operational Change Management |
Remote - Missouri

Kate Middleton
View Profile

- Change Personal Information in your Actions tab/Personal Data
- If you change your address, you also need to change tax forms! Tax forms don't automatically update. Update Tax forms through your Benefits and Pay app.

MENU

Search

Benefits and Pay

Overview

Benefits

Pay

Compensation

Tasks and Reports

Payment Elections

Change Benefits

My Tax Documents

Overview

Most Recent Pay
Your next pay day is April 30, 2024.

Deductions
Taxes and deductions from your most recent payslip.

MENU

Kate Middleton
Workday Queen

Actions

View Roles for Worker ...

Benefits

Business Asset

Business Process

Compensation

Expenses

Job Change

Manage Work

Organization

Payroll

Personal Data

Procurement

Provisioning Groups

Recruiting

Safety Incident

Talent

Location
Remote - Missouri

Change My Home Contact Information

Change Emergency Contacts

View My Emergency Contacts

View My Primary Address Changes

Change My Personal Information

View My Personal Information

Change My Photo

Change My Legal Name

Change My Preferred Name

View My ID Information

Change My Veteran Status Identification

View My Veteran Status Identification

Complete Form I-9

View My Form I-9

Print Form I-9

Change Self-Identification of Disability

View My Disability Self-Identification Form

Maintain My Payment Elections

Delete My Photo

Time in Position 2 year(s), 0 month(s)

Talent

Performance Review 2024 Annual



Benefits and Pay

The main screen provides an overview of your pay and withholdings

- You can view your benefits related items in the Benefits dropdown
- You can view previous pay details and tax information under the Pay dropdown
- You can view your compensation summary under the Compensation dropdown

Tasks and Reports

[Payment Elections](#) [Change Benefits](#) [My Tax Documents](#)

Overview

Most Recent Pay
Your next pay day is September 29, 2023.

\$3,559.50
Take Home Pay

Gross Pay \$4381.81

[View Most Recent Pay](#)

Deductions
Taxes and deductions from your most recent pay slip.

\$687.89
Total

403(b) Employee Pre-Tax	\$200.00
Federal Withholding (Federal)	\$256.33
Social Security (Federal)	\$185.22
State Tax (Missouri)	\$46.34

[View Benefit Details](#)

[More \(6\)](#)

Compensation Summary
Your current compensation assignments.

\$52,581.72
Total Base Pay

Salary Plan USD Annual

[My Compensation Summary](#)



Common Questions: Adding Beneficiaries

Adding beneficiaries for a life event



Benefits and Pay

Tasks and Reports

- [Payment Elections](#)
- [Change Benefits](#)
- [My Tax Documents](#)

Overview

Most Recent Pay
Your next pay day is September 29, 2023.

\$3,559.50
Take Home Pay

Gross Pay \$4381.81

[View Most Recent Pay](#)

Deductions
Taxes and deductions from your most recent pay slip.

\$687.89
Total

403(b) Employee Pre-Tax	\$200.00
Federal Withholding (Federal)	\$256.33
Social Security (Federal)	\$185.22
State Tax (Missouri)	\$46.34

[More \(6\)](#)

Current Benefit Costs

\$134.42
Employee Cost (Monthly)

[View Benefit Details](#)

Compensation Summary
Your current compensation assignments.

\$52,581.72
Total Base Pay

Salary Plan USD Annual

[My Compensation Summary](#)

Change Benefits

Change Reason * select one

- select one
- Adoption
- Birth
- Change Anytime (Optional Life, HSA, LTD Buyup, RMSA)
- Change Beneficiary**
- Dependent Arrival in US (trailing dependent)
- Divorce / Dissolution of Domestic Partnership
- Gain of Outside Coverage
- Loss of Outside Coverage
- Marriage / Domestic Partnership
- Medicaid Coverage Change
- Spousal Surcharge Change
- Supplemental LTD Change

[Submit](#)

[Add, Change or Remove Beneficiaries](#) Tutorial

Select **Change Beneficiary** as your reason if you want to add a beneficiary, remove a beneficiary or change allocation percentages.



Direct Deposit

Setting up your account – [Manage Payment Elections](#) Tutorial

Benefits and Pay 1

Tasks and Reports
[Payment Elections](#) [Change Benefits](#) [My Tax Documents](#)

Overview 2

Most Recent Pay
 Your next pay day is September 29, 2023.
 \$ [blacked out]
 Take Home Pay
 Gross Pay \$7,124.23
[View Most Recent Pay](#)

Deductions
 Taxes and deductions from your most recent payslip.
\$2,764.51
 Total
 403(b) Employee Pre-Tax \$1,282.37
 Federal Withholding (Federal) \$599.94
 Social Security (Federal) \$435.04
 State Tax (Missouri) \$211.00
[More \(6\)](#)

Current Benefit Costs
\$135.17
 Employee Cost (Monthly)
[View Benefit Details](#)

Compensation Summary
 Your current compensation assignments.

Select add to add an additional account, or Edit/Remove/View an existing account

Accounts 1 item

Account Nickname	Country	Bank Name	Account Type	Account Number	
Together	United States of America	Together Credit Union	Checking	*****4904	Edit Remove View

[Add](#) 3

Account Information 4 - Fill in information

Account Type * Checking Savings

Routing Transit Number *

Account Number *

Bank Name *

Bank Identification Code

Account Nickname (optional)

5 [OK](#) [Cancel](#)

From the overview page in the Benefits and Pay hub



Direct Deposit

- Distribution to more than one account
 - Percentages are not allowed
 - Dollar amounts must be entered first
 - Remaining balance account should be listed last

Payment Elections 2 items

	Order	*Country	*Currency	*Payment Type	Account	*Balance / Amount / Percent ?
+ -	▼	× United States of America	× USD	× Direct Deposit - Payroll	× Bank of America	<input type="radio"/> Balance <input checked="" type="radio"/> Amount <input type="text" value="100.00"/>
+ -	▲	× United States of America	× USD	× Direct Deposit - Payroll	× test	<input checked="" type="radio"/> Balance <input type="radio"/> Amount <input type="text" value="0.00"/>

Regular vs. Expense Payments

- Regular = Payroll
- Expense = Reimbursements

Payment Elections 2 items

Pay Type	Payment Type
Regular Payments ?	Direct Deposit - Payroll
Expense Payments	Direct Deposit - Payroll



Payroll Dates

- Non-Exempt, hourly workers get paid every 2 weeks (bi-weekly) - BWK
- Exempt, salaried workers get paid on the last business day of the month (once monthly) - MON/STP

Payroll Dates 2024

Understanding My Payslip

WashU 2024 Payroll Calendar

P/R	Pay Period	Deductions	See additional information below regarding Faculty Bonus payment deadlines		Time Tracking Mass Submit 5:00PM	Time Tracking/Absence Approvals by 11:59PM Unless otherwise noted	Payroll Costing Allocations <u>must</u> be entered prior to Payroll Close at 2:00PM	Pay Date
			Dept Submission for Batch Load (EIB)	Dept Submission for Hires, Job/Pay Changes, One-Time Payments, Period Activity Pay by 11:59AM				
BWK	03/17 - 3/30	*	3/26	3/29	3/31	4/1	4/3	4/5
BWK	3/31 - 4/13	**	4/9	4/12	4/14	4/15	4/17	4/19
MON/STP	4/1 - 4/30	****	4/9	4/23	NA	NA	4/26	4/30
BWK	4/14 - 4/27	*	4/23	4/26	4/28	4/29	5/1	5/3
BWK	4/28 - 5/11	**	5/7	5/10	5/12	5/13	5/15	5/17
BWK	5/12 - 5/25	***	5/21	5/24	5/26	5/28 at 12pm	5/29 3PM Close	5/31
MON/STP	5/1 - 5/31	****	5/7	5/22	NA	NA	5/28	5/31
BWK	5/26 - 6/8	*	6/4	6/7	6/9	6/10	6/12	6/14
BWK	6/9 - 6/22	**	6/18	6/21	6/23	6/24	6/26	6/28
MON/STP	6/1 - 6/30	****	6/4	6/20	NA	NA	6/25	6/28
BWK	6/23 - 7/6	*	7/2	7/5	7/7	7/8	7/10	7/12
BWK	7/7 - 7/20	**	7/16	7/19	7/21	7/22	7/24	7/26
MON/STP	7/1 - 7/31	****	7/16	7/24	NA	NA	7/29	7/31
BWK	7/21 - 8/3	*	7/30	8/2	8/4	8/5	8/7	8/9
BWK	8/4 - 8/17	**	8/13	8/16	8/18	8/20	8/21	8/23
MON/STP	8/1 - 8/31	****	8/13	8/23	NA	NA	8/28	8/30
BWK	8/18 - 8/31	*	8/27	8/30	9/1	9/3 at 12pm	9/4 3PM Close	9/6
BWK	9/1 - 9/14	**	9/10	9/13	9/15	9/16	9/18	9/20
MON/STP	9/1 - 9/30	****	9/10	9/23	NA	NA	9/26	9/30
BWK	9/15 - 9/28	*	9/24	9/27	9/29	9/30	10/2	10/4
BWK	9/29 - 10/12	**	10/8	10/11	10/13	10/14	10/16	10/18
MON/STP	10/01 - 10/31	****	10/8	10/24	NA	NA	10/29	10/31
BWK	10/13 - 10/26	*	10/22	10/25	10/27	10/28	10/30	11/1
BWK	10/27 - 11/9	**	11/5	11/8	11/10	11/11	11/13	11/15
BWK	11/10 - 11/23	***	11/19	11/20	11/23	11/24	11/25	11/27
MON/STP	11/01 - 11/30	****	11/5	11/19	NA	NA	11/22	11/27
BWK	11/24 - 12/7	*	12/3	12/6	12/8	12/9	12/11	12/13
BWK	12/8 - 12/21	**	12/17	12/18	12/22	12/20	12/23 3PM Close	12/27
MON/STP	12/01 - 12/31	****	12/17	12/19	NA	NA	12/26	12/30



Managing Your Time:

Bi-weekly Workers

- ❑ You cannot correct your own time (punches)
- ❑ Unmatched punch or other problems with Time Tracking – go to your supervisor (*must be corrected by your Supervisor, Departmental Timekeeper, or Departmental HR Partner*)
- ❑ [Entering Time](#) Tutorial

Monthly Workers

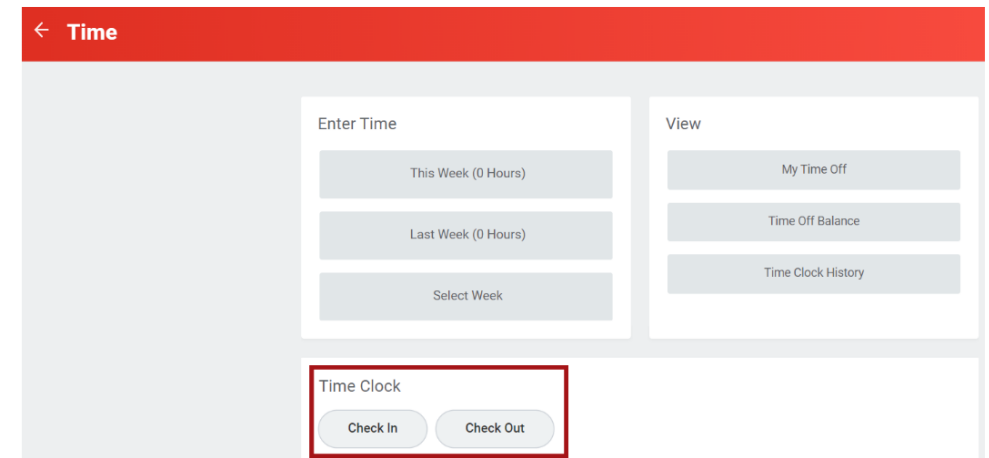
- ❑ Do not enter their time daily



Time

The **Time** application is where you can find the web clock.

This application will only appear for workers who are **hourly**. You can check-in and check-out here if you are an hourly worker.





Common Questions: Time Tracking

Mobile App:



- [Mobile Setup Reference Guide](#)
- Loading the app with code (Organizational ID: wustl)
- Mobile Time Entry - refer to the [Time Entry and Rounding Rules](#) Reference Guide
- Difference in punches for PC (4 punches) vs. Mobile App (6 punches)

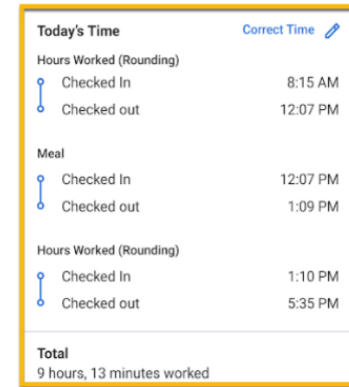


4 PC punches:

- Clock In (Hours Worked)
- Clock In (Meal)
- Clock In (Hours Worked)
- Clock Out

6 mobile app punches:

- Clock In (Hours Worked)
- Clock Out (Hours Worked)
- Clock In (Meal)
- Clock Out (Meal)
- Clock In (Hours Worked)
- Clock Out (Hours Worked)



- Please check with your department supervisor for guidance.
- Update mobile app every month to make sure you have the current version.
- "Cannot load tenant" error = update mobile app.



Bi-weekly Workers:

- Must enter ALL time taken off work **INCLUDING HOLIDAYS:**
 - Vacation, Sick time, Holidays, Etc.
- Unlike missed punches, workers can edit/correct time off requests (approved and unapproved)

Monthly Workers:

- Do not enter holidays as time off (and do not have to clock in/out daily)
- Other time off from work must still be entered
- Can edit/correct time off requests (approved and unapproved)

View Vacation and Sick Time Balances:

- Under your profile, select **Absence** then the **Absence Balances** tab

For All Workers:

- As of March 1, there is no longer a waiting period to take vacation time
- You can take accrued sick time anytime

[Request Time Off](#) Tutorial



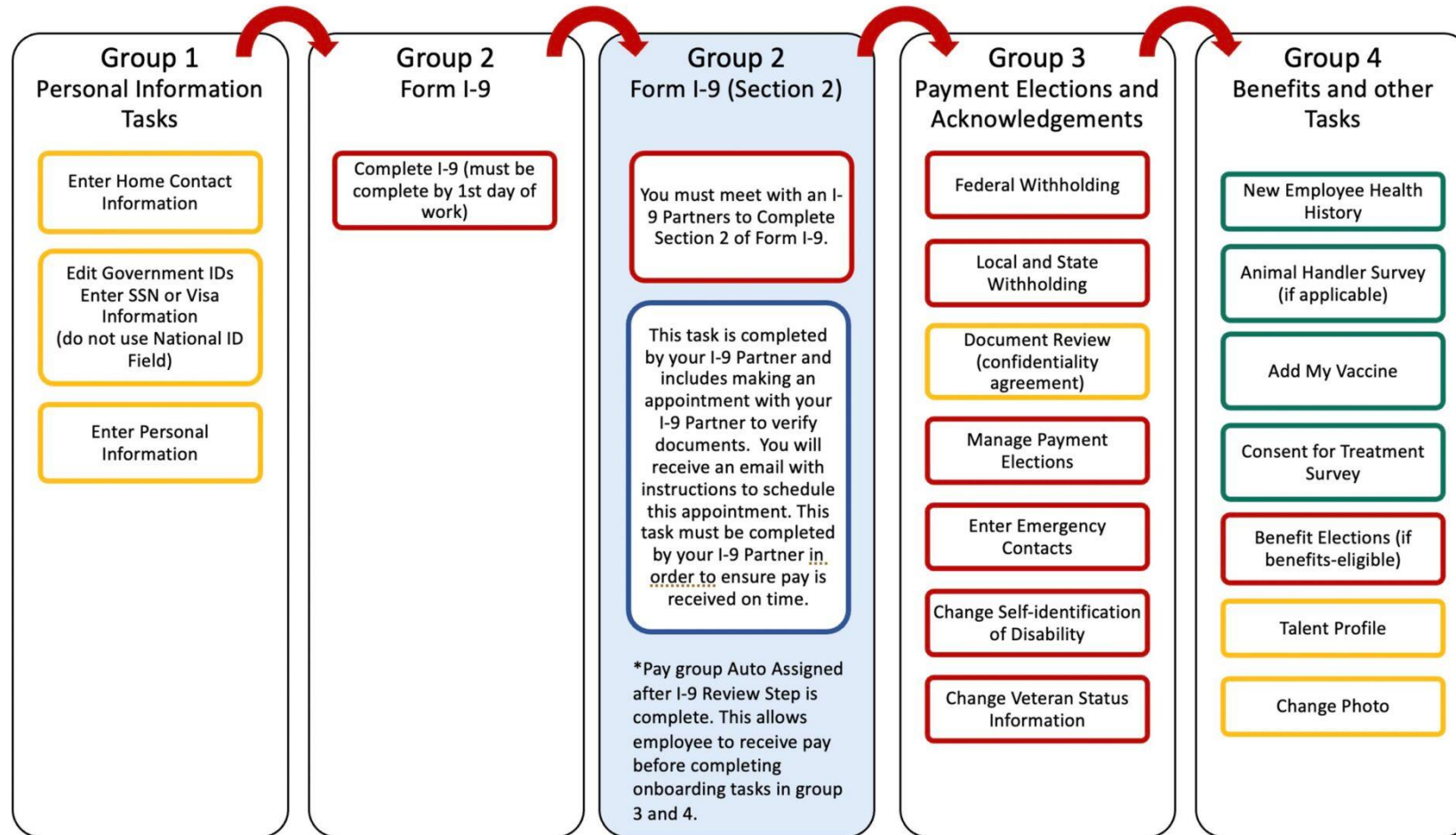
Absence

The screenshot shows the 'Absence' interface with two main sections: 'Request' and 'View'. The 'Request' section contains buttons for 'Request Absence' and 'Correct My Absence'. The 'View' section contains buttons for 'My Absence', 'Absence Balance', and 'View Teams'. Below these is a section titled 'Available Balance as of Today' which is highlighted with a yellow border. This section includes a note 'Does not include future absence requests' and a table of available balances:

Available
147.06 Hours - Sick
110.37 Hours - Vacation



Common Questions: Onboarding Stages



Note: All tasks in one group must be complete before tasks from the next group will be assigned.

Workers cannot be paid until all tasks in group 1 and group 2 are complete.

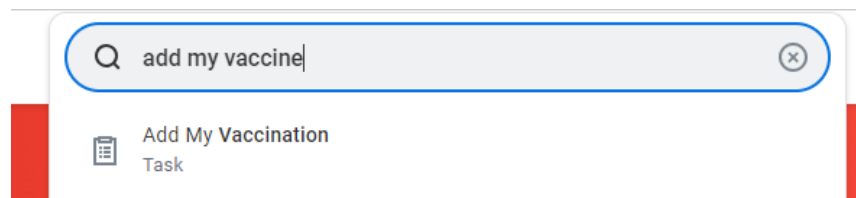
- Employees Only
- All Workers
- Employees with Occupational Health Service Needs
- I-9 Team



Vaccine Requirement Step

- Workers required to have vaccines as a condition of employment may have a task during onboarding to enter vaccine documentation or during an annual vaccine tracking event.
- Workers can see Vaccines information once they are approved by Occupational Health
- If Occupational Health administered your vaccine, you do not need to enter it in Workday

Add and View My Vaccines in Workday



A screenshot of the "Add My Vaccination" form in Workday. The form includes a "Status Definition of 'Fully Vaccinated'" section with a list of vaccine requirements. Below this is a section for "Exemptions to mandatory vaccination" with instructions on how to request an exemption. The form also has input fields for "Vaccine Type" and "Vaccination Status", a comment field, and an "Attachments" section. At the bottom, there are buttons for "Submit", "Save for Later", and "Cancel".

Add My Vaccination [Close]

Status Definition of "Fully Vaccinated":

- Hepatitis B: Total of Three Doses need to be recorded.
- Hepatitis A: Total of Two Doses need to be recorded.
- MMR (Measles, Mumps, Rubella): Total of Two Doses need to be recorded.
- Varicella (Chickenpox): Total of Two Doses need to be recorded.
- Rabies: Total of Two Doses need to be recorded.
- Ticovac: Total of Four Doses need to be recorded.
- Covid: Depending on which series either Single Dose or Total of Two Doses in the series need to be recorded.
- Flu: Single Dose Recorded.

Exemptions to mandatory vaccination may be granted based on sincerely held religious beliefs, practices or observances. Individuals seeking a religious exemption must submit an exemption request form and any requested documentation to employeerelations@wustl.edu. Do not request a religious exemption through Workday.

Vaccine Type *

Vaccination Status *

enter your comment

Attachments

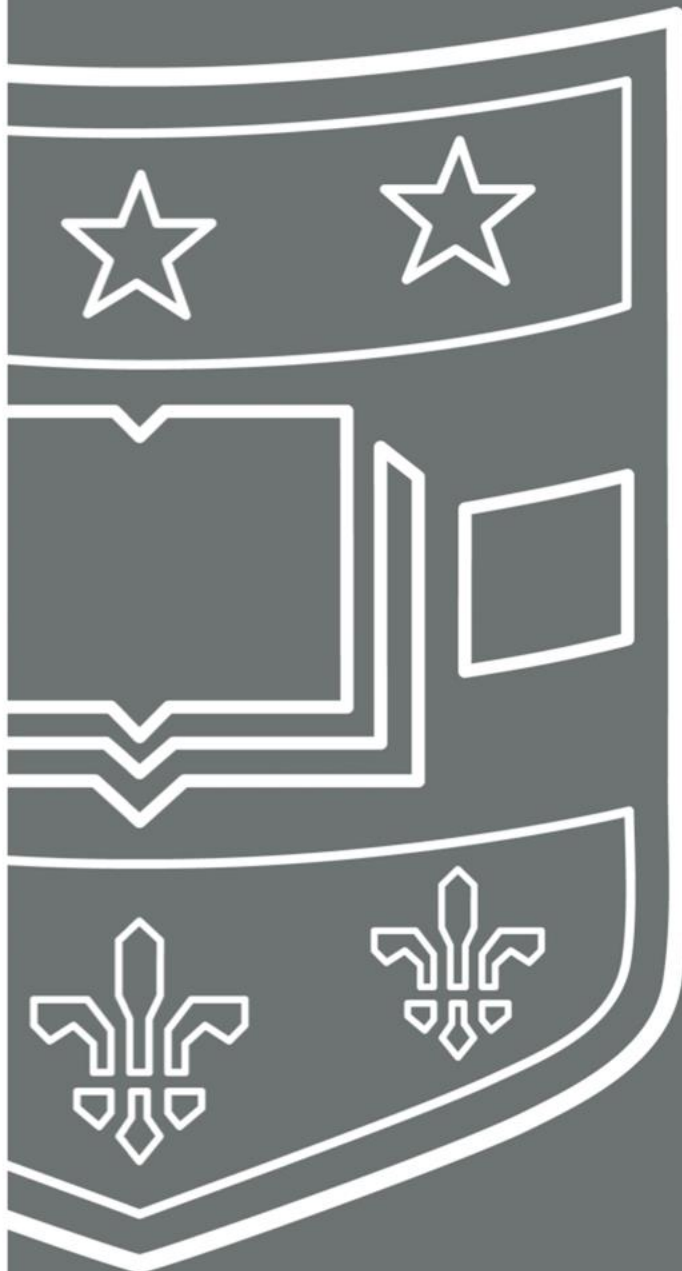


Fiscal Month and Year End Close

Workday@WashU

- Fiscal Year 2024 (FY24) will end on June 30, 2024.
- New Fiscal Year will start on July 1, 2024; will be FY25.
- If your role includes approving transactions, please make sure they are completed by June 30.

- [Fiscal Month End Close \(July-May\)](#) - Key dates leading up to Fiscal Year End (FYE) Close
- [Fiscal Year End Close Overview:](#)
 - Information about Fiscal Year End
 - Schedule of Fiscal Year End Closing
- [Training and User Group Events:](#)
 - Calendar of helpful "Office Hours" (access to Workday HR and Finance teams for Fiscal Year End questions)
 - Training events for specific Workday Year End topics

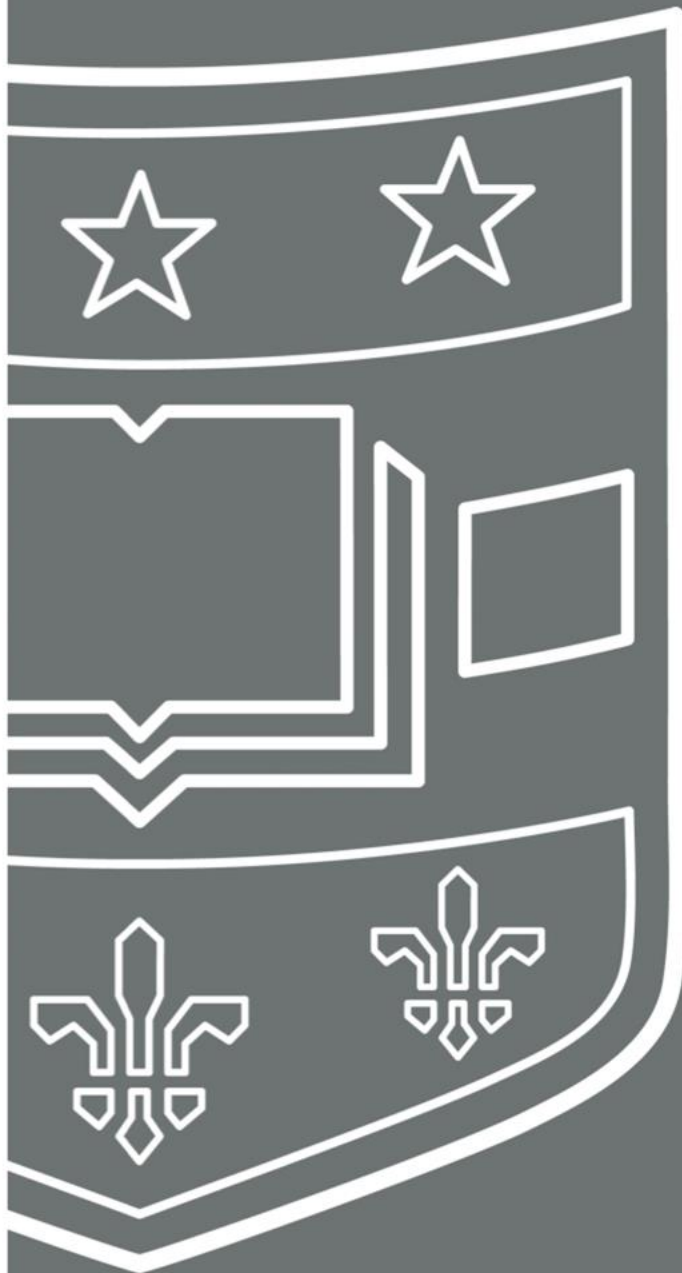


Workday Help:

Q & A Break

What questions do you have about:

- Benefits
- Retirement – TIAA
- Changing Personal Information
- Benefits and Pay Hub
 - Viewing your pay and withholdings
 - Tax Documents
 - Adding Beneficiaries
 - Direct Deposit
- Payroll Dates
- Time Tracking
- Entering Absences
- FY24 Close



Wrap Up

Support Options:

- Questions – Start at Workday@WashU (workday.wustl.edu)
- In Workday, use Your Sidekick (browsers other than Firefox)
- Go to your manager

Workday Help Desk:

- Hours: 8:00 a.m. – 5:00 p.m., Monday – Friday
- Phone: (314) 935-WDAY (9329)

ServiceNow (ticketing system):

- Submit a [Ticket](#)
- Ticketing Process



Quick view of links provided today in the presentation:

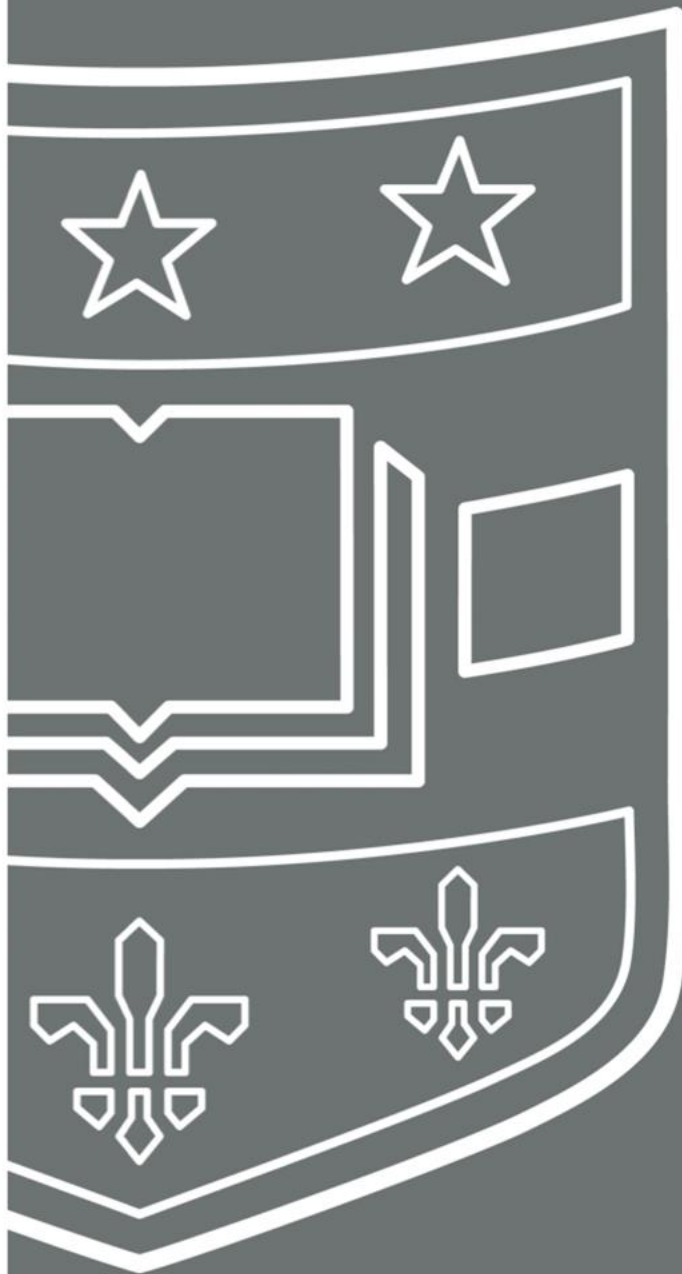
- [Workday@WashU](#)
- [One WUSTL](#)
- [Sidekick](#)
- [Workday Feature releases](#)
- [Payroll Services](#)
- [Benefits Open Enrollment](#)
- [Spousal Surcharge](#)
- [HR Benefit Page](#)
- [Faculty/Staff 2024 Benefit Guide](#)
- [HR Retirement Savings](#)
- [View Tax Documents](#)
- [Add, Change or Remove Beneficiaries](#)
- [Entering Time](#)
- [Mobile Setup in Workday](#)
- [Time Entry - Mobile](#)
- [Time Entry and Rounding Rules](#)
- [Request Time Off](#)
- [Manage Payment Elections](#)
- [New Hire Onboarding](#)
- [ServiceNow](#)



**Before we get to the Q&A session,
we want to thank you for joining us today for live, virtual training.**

We value your feedback!

- This presentation along with a short survey will be emailed to you
- Please complete the survey in the next week, if possible, to help us plan for our next live session
- Please reach out if you need further assistance



Questions and Answers Session

What questions do you have about Workday?

Workday@WashU