

# HR Workday Town Hall

April 17, 2024

# HR Workday Town Hall Agenda

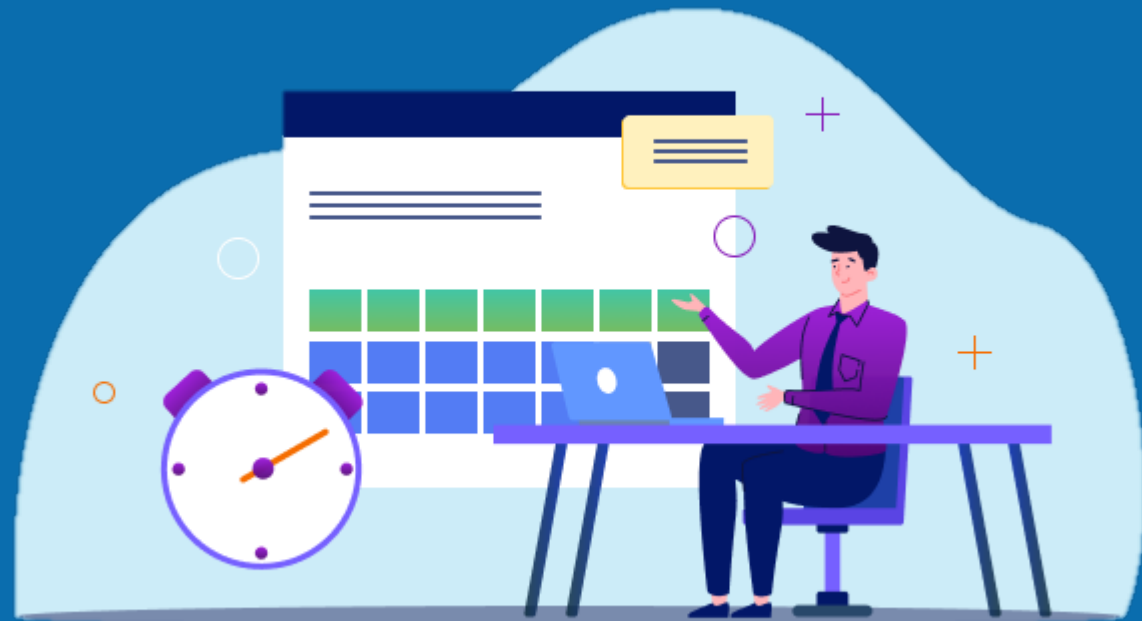
April 17, 2024

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- Welcome
- Payroll Costing Allocations
- HR Security Roles in Workday
- Workday Insights
- Next Steps/Q&A



# Payroll Costing Allocations



# Payroll Costing Allocations

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- Payroll Costing Allocations (PCAs) are used to distribute payroll costs to the appropriate driver worktags (Cost Center, Gift, Grant, etc.).
- Costing allocations are maintained for workers through the **Assign Costing Allocations** task.
- You must have the security role of Manager, Cost Center Manager, or Payroll Costing Initiator to create or edit a Payroll Costing Allocation in Workday.
- Each employee can view their own costing allocations in Workday by navigating to the **Pay** tab under their personal profile.

# Payroll Costing Allocations

W Search

Results Input Pay Group Tax Elections Withholding Orders Payslips **Costing Allocations**

> Default Organizational Assignments

Current and Future Costing Allocations 1 item ?

Start Date	End Date	Costing Allocation Level	Position Restrictions	Costing Company	Costing (As of Start Date)
01/01/2023		Position Restrictions	P00029423 Accounting Manager - Kelsey May (0141896)	Vanderbilt University Medical Center	Cost Center: CC00677 MCA Finance Ente Division Function Code: FC23023 Institutional Sup General Administration Fund: FD001 General Fund Operating Entity: OEMCA Medical Center Administration

? View All Costing Allocations ?

Kelsey May (0141896)  
She  
Accounting Manager

Actions

Email Team

Summary  
Job  
Compensation  
Benefits  
Absence  
**Pay**

Kelsey May (0141896)  
View Profile

Home  
My Account  
Sitemap  
Favorites  
Drive  
My Reports  
Documentation  
Recovery Assistant

Sign Out

WalkMe Menu: ?

# Worker Costing Allocations (WCAs)

**Maintain** Guide me

> Default Organizational Assignments

Current and Future Costing Allocations 3 items ?

Start Date	End Date	Costing Allocation Level	Position Restrictions
06/01/2023		Worker Earning	

Assign Costing Allocation

Please enter the employee's name in the Position Restrictions field to initiate the new costing allocation.

**Include Existing Allocations** ?

From 04/16/2024

To MM/DD/YYYY

**Worker Costing** ONLY use Worker Costing Section for Specific Allowance Plans

Worker

Position ?

Earning ?

**Position Restrictions Costing**

Effective Date ? 04/16/2024

Position Restrictions ?

Cancel OK

# Costing Hierarchy for Employee Earnings

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Worktag Overrides entered through payroll inputs and Kronos payroll input

Worktag values entered through compensation (i.e., one-time payments)

Worker Costing Allocation (specific earning for a worker)

Position Restriction Costing Allocation

Default Organization Assignments (for specific worker)

# Worker Costing Allocations (WCAs)

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WCAs are only applicable for the following types of Allowance Plans:

- Academic Overload Allowance (AOL)
- Administrative Supplement (ADS)
- House Staff Supplement (HSS)
- Service Free Stipends (STP)



# Worker Costing Allocation (WCA)

Is this allocation for one of the following **Allowance Plans**?

- Academic Overload Allowance (AOL)
- Administrative Supplement (ADS)
- House Staff Supplement (HSS)
- Service Free Stipends (STP)

If this is a standard Payroll Costing Allocation not related to one of the specific plans above, click "No".

[Yes](#)

[No](#)

Step 1/2 By WalkMe



Click to Confirm this Costing Allocation is for one of the Allowance Plans listed below **ONLY**:

- Academic Overload Allowance (AOL)
- Administrative Supplement (ADS)
- House Staff Supplement (HSS)
- Service Free Stipend (STP)

[Confirm](#)

Otherwise, [Skip](#) this section and go to the **Position Restrictions Costing** section below for all other Costing Allocations.

Step 2/2 By WalkMe



### Assign Costing Allocation

*Please enter the employee's name in the [Position Restrictions](#) field to ini*

**Include Existing Allocations** ?

From

To

**Worker Costing** ONLY use Worker Costing Section for Specific Allowance Plans

Worker

Position ?

Earning ?

# Worker Costing Allocation (WCA)

?

Maintain Guide me

> Default Organizational Assignments

Current and Future Costing Allocations 3 items ?

Start Date	End Date	Costing Allocation Level	Position Restrictions	Earning	Costing Company	Costing (As of Start Date)	Distribution Percent
06/01/2023		Worker Earning		Academic Overload (AOL)	Vanderbilt University Medical Center	CARTS: CTTVV Teaching - VUMC to VU Billing - VUMC to VU Billing Cost Center: CC02989 Pediatrics - Chairman's Office Div - CD Clin Education Function Code: FC18018 Instruction and Departmental Research Fund: FD001 General Fund Operating Entity: OEClin_Edu Clinical Department Education Program: PG001968 PED Chairman's Office DIV - CD Clin Edu - Soneducationsupport (3075751060)	100.00%

# Position Restriction Costing Allocations (PCA)

[?](#) [Maintain](#) [Guide me](#)

> **Default Organizational Assignments**

Current and Future Costing Allocations 1 item [?](#)

Start Date	End Date	Costing Allocation Level	Position Restrictions	Costing Company	Costing (As of Start Date)	Distribution Percent
01/01/2023		Position Restrictions	P00029423 Accounting Manager - Kelsey May (0141896)	Vanderbilt University Medical Center	Cost Center: CC00677 MCA Finance Enterprise Division Function Code: FC23023 Institutional Support - General Administration Fund: FD001 General Fund Operating Entity: OEMCA Medical Center Administration	100.00%

[View All Costing Allocations](#) [?](#)

Position Restriction Costing Allocations are the standard payroll costing allocations in Workday.

# Position Restriction Costing Allocations (PCA)

Is this allocation for one of the following **Allowance Plans**?

- Academic Overload Allowance (AOL)
- Administrative Supplement (ADS)
- House Staff Supplement (HSS)
- Service Free Stipends (STP)

If this is a standard Payroll Costing Allocation not related to one of the specific plans above, click "No".

[Yes](#)

[No](#)

Step 1/2

By WalkMe



## Assign Costing Allocation

*Please enter the employee's name in the [Position Restrictions](#) field*

### Include Existing Allocations ?

From 04/15/2024

To MM/DD/YYYY

### Position Restrictions Costing

Effective Date ? 04/01/2024

Position Restrictions ?

# Position Restriction Costing Allocations (PCA)

## Costing Criteria

Effective Date 04/01/2024 ?

Position Restrictions P00029423 Accounting Manager - Kelsey May (0141896)

## Include Existing Allocations

From 04/16/2024 To (empty)

Copy Costing Allocation ?

Start Date \* 01/01/2023 

End Date ? 03/31/2024 

## Costing Criteria

Effective Date 04/01/2024 ?

Position Restrictions P00029423 Accounting Manager - Kelsey May (0141896)

## Include Existing Allocations

From 04/16/2024 To (empty)

Copy Costing Allocation


Start Date \* 04/01/2024 

End Date MM/DD/YYYY 

# Position Restriction Costing Allocations (PCA)


Costing Allocation Details 1 item


	Order	Default (As of Start Date)	Required with no Default (Must have Costing Override)	Costing Company	Grant	Gift	Project	Program	Cost Center	*Fund	*Operating Entity
	+ -	▼	Company: Vanderbilt University Medical Center Cost Center: CC00677 MCA Finance Enterprise Division Function Code: FC23023 Institutional Support - General Administration Fund: FD001 General Fund Operating Entity: OEMCA Medical Center Administration								



Costing Allocation Details 1 item

Default (As of Start Date)	Required with no Default (Must have Costing Override)	Costing Company	Grant	Gift	Project	Program	Cost Center	*Fund	*Operating Entity	Assignee	Additional Worktags
		× Vanderbilt University Medical Center					× CC00677 MCA Finance Enterprise Division	Search × FD001 General Fund	Search × OEMCA Medical Center Administration		Search × CARTS: CTZZZ Other - Non-AE Center - Non-AE Center × Function Code: FC23023 Institutional Support - General Administration × Service Line: SL999 Service Line Not Applicable



MENU  Q CC00677

**CC00677 MCA Finance Enterprise Division** ...

Type Cost Center Restricted to Companies Vanderbilt University Medical Center

# Common PCA Questions & Errors

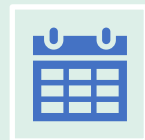
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Follow the guides:

[PCA Guide for Non-Research](#)

[PCA Guide for Research](#)



The effective date must be the start date of the current or future pay period (or hire date).



Do not enter expired grants (or expiring this month) into your PCAs. You will have to do a Payroll Accounting Adjustment (PAA) because Workday will charge the default org cost center.

# Common PCA Questions & Errors

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Pay attention to driver worktags (Gift, Grant, etc.) and related worktags as you enter each line of the costing allocation.



It is best practice to add a new line when you need to enter a new funding source and delete the old line.



If someone is hired into an existing position, it is common for an employee to inherit an existing allocation. Update the Start Date to align with the new employee's effective date.



# Default Organization Assignments

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- Default Organization Assignments are required on every position.
- The Default Organization assignments must include Company, Cost Center, Function Code, Fund, & Operating Entity worktags.
- The Default Cost Center associated with a worker is used as the cost center to charge salary/benefits for a worker when there is an expired or missing costing allocation.

# Default Organization Assignments

The screenshot displays a user profile for Kelsey May (0141896), an Accounting Manager. The profile includes a circular photo, name, title, and an 'Actions' button. Below the profile are icons for 'Email' and 'Team'. A 'Summary' section is visible at the bottom left of the profile card.

The main content area features a navigation bar with tabs: Results, Input, Pay Group, Tax Elections, Withholding Orders, Payslips, and Costing Allocations. The 'Costing Allocations' tab is active.

A red box highlights the 'Default Organizational Assignments' section, which lists the following details:

- Company: Vanderbilt University Medical Center
- Cost Center: CC00677 MCA Finance Enterprise Division
- Function Code: FC23023 Institutional Support - General Administration
- Fund: FD001 General Fund
- Operating Entity: OEMCA Medical Center Administration

Below this section, the 'Current and Future Costing Allocations' section shows 1 item:

Start Date	End Date	Costing Allocation Level	Position Restrictions
01/01/2023		Position Restrictions	P00029423 Accounting Manager - Kelsey May (0141896)

# Default Organization Assignments

If the Default Organization Assignments are incorrect, the employee's Manager can correct the assignments.

Under the employee's profile, click **Actions** > **Organization** > **Change Organization Assignments**.

The screenshot displays an employee profile for a Research Specialist Sr. The left sidebar contains navigation options: Actions, Email, Team, Summary, Job, Compensation, Absence, Pay, and Contact. The main content area shows the 'Costing Allocations' tab with a 'Maintain' button and a section for 'Default Organizational Assignments'. The current assignment is: CARTS: CTAAC Administrative - Administrative - Academic, Company: Vanderbilt University Medical Center, Cost Center: CC03020 Pediatrics - Infectious Diseases Div - CD Clin Research Admin, Function Code: FC18018 Instruction and Departmental Research, Fund: FD001 General Fund, and Operating Entity: OEClIn\_RA Clinical Department R. Below this is a table for 'Current and Future Costing Allocations' with one item ending on 'End'. A secondary screenshot shows the 'Actions' menu with 'Organization' selected, leading to 'Change Organization Assignments'. A third screenshot shows the 'Worker' details, including contact information and a work address: 61 21ST AVE S NASHVILLE, TN 37232 United States of America.

# Costing Allocation Review

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Initiators and Approvers should review costing allocations each month to ensure salary expenses are costed accurately.



These reports are available in Workday to assist with your review:

All Position Restrictions Costing Allocations  
All Workers Costing Allocations  
RPT144 CR Vanderbilt Effort – Position Restrictions



Payroll Costing changes must be submitted and approved by the payroll deadline to be included with the regular payroll.



The payroll calendar is published on the VUMC HR Website:

<https://hr.vumc.org/payroll/payroll-calendar>

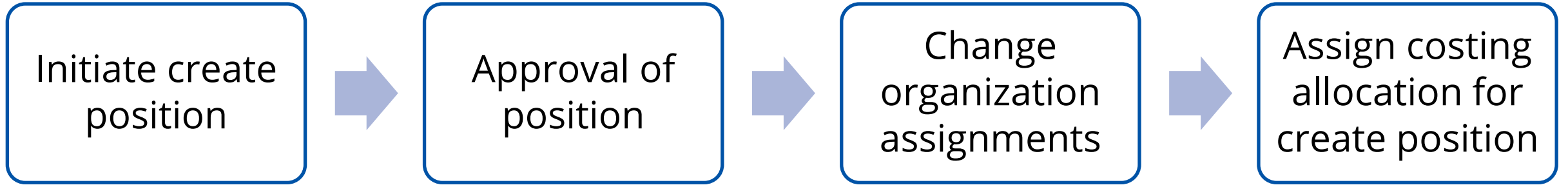
# Best Practice – Position Creation

# Position Creation Process

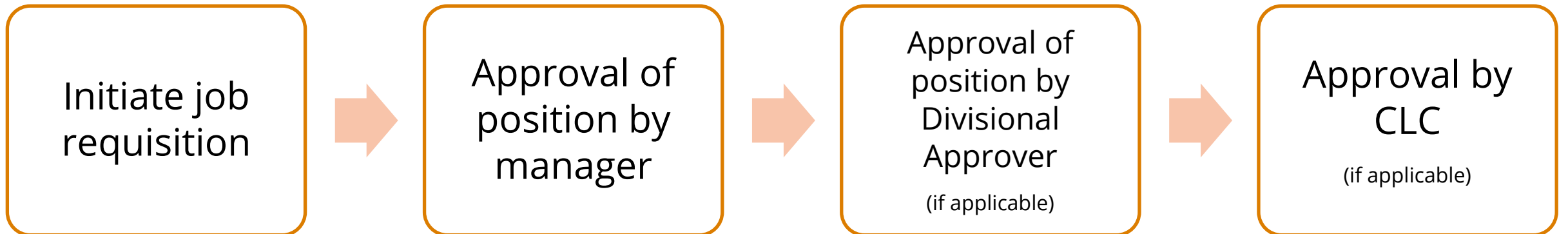
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- Should create position PRIOR to creating a job requisition for recruiting, including any position costing allocation updates.
- Allows for position number to be created, which helps in the approval process for those areas where a position number is required to be submitted in the PAR process.
- Job requisition only allows one costing allocation to be added. Adding the costing allocation on the position, helps with providing additional information in the approval process through reporting.
  - Default cost center used on job requisition
  - Multiple costing allocations

## Business Process 1: Create Position



## Business Process 2: Create Job Requisition



# HR Security Roles in Workday







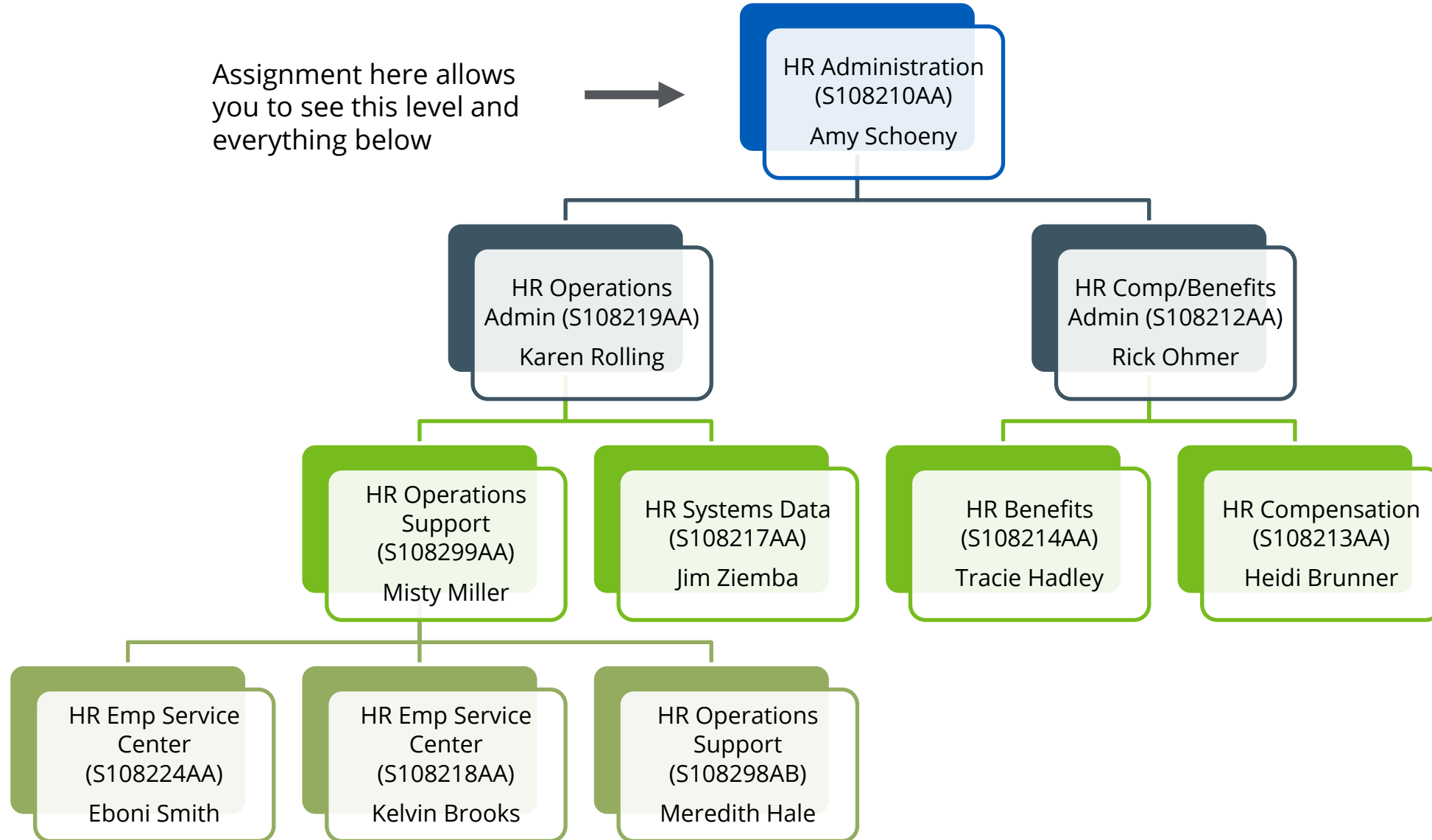
# Current HCM Roles (for departmental users)

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- Roles
  - Manager
  - HCM Business Manager
  - HCM Business Assistant with Compensation
  - HCM Business Assistant without Compensation.
  
- Assigned at the supervisory organization level
  - Manager – access to sup org the role is assigned
  - HCM Business Manager, HCM Business Assistant roles – access to the sup org assigned and inherits down

# Organization Hierarchy Assignment

Assignment here allows you to see this level and everything below



# Manager Role

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- Manager – only one manager can be assigned to a sup org
- People manager – individual who has other people reporting to them
- Business processes related to the management of their team, including the initiation of:
  - Job requisitions
  - Recruitment
  - Hiring
  - Onboarding
  - Data changes (reclassifications, compensation changes, etc.)
  - One time payment
  - Performance Management
  - Time Off approvals
- First approvers for some financial transactions, such as expense reports, Pcard and T&E card transactions



# HCM Business Manager Role

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## APPROVAL on behalf of manager

- HCM Business Manager can be assigned to more than one supervisory organization
- Once assigned on a supervisory organization, the role inherits down
- Approving authority for inbox items in place of the manager.
- Ability to review/approve/action steps where manager or manager's manager has a step in the business process.
  - Tasks go to the inbox of both the Manager and the HCM Business Manager.
  - Once either individual takes action, it is removed from both inboxes.



# HCM Business Assistant Role

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## INITIATE on behalf of manager

- HCM Business Assistant can be assigned to more than one supervisory organization
- Once assigned on a supervisory organization, the role inherits down
- Ability to initiate and view HR processes on behalf of the manager.
  - Role included on action steps to support inbox actions on behalf of managers.
  - Items go to the inbox of both the Manager and the HCM Business Assistant where appropriate.
  - Once either individual takes action, it is removed from both inboxes.
- The HCM Business Assistant with Compensation is able to view and initiate items where compensation is involved.

# Delegations

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- Temporary delegation of business processes to others within their supervisory organization when they are unable to complete those processes.
- Should be used for PTO and Leave of Absence
- Cannot exceed 16 weeks in length
- Can delegate to peers or superiors without approval, and subordinates with approval.
- Some processes are not available for delegation.

# Additional Items

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- An individual should not have HCM Manager and HCM Business Assistant roles assigned.
  - Segregation of duties issue
  - May cause a circular issue in the approval process and skip over individuals
  
- How do I request a WD security role?
  - Submit a Pegasus ticket
  - Please be sure to include all necessary information, including the supervisory organization you are requesting access to

# COMING SOON – New HCM Viewer roles

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## ➤ **HCM Leader Viewer**

- View only access to same information as a manager;
- Inherits access to data down supervisory organization

## ➤ **HCM Viewer with Comp**

- View only access to same information as a manager, but does not have access to performance and disciplinary information
- Inherits access to data down supervisory organization

## ➤ **HCM Viewer without Comp**

- View only access to same information as a manager, but does not have access to performance, disciplinary, and compensation information
- Inherits access to data down supervisory organization



# Workday Insights



# Reminders

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- Review your inbox for any outstanding mid-year review items you may have. It is important to try to clear those items.
- Make sure you are approving and reporting PTO requests in a timely manner. Both entering and approving time off requests prior to the end of the pay period is important so any downstream impacts on things like effort certification or other items is minimized.

**Next HR Town Hall:**

**Wednesday, May 15, 10:00 am**





Questions?