

INTEGRATED RENEWAL PROGRAM HCM CALL IN EVENT

We will begin shortly - please note:

- We have **muted your audio and turned off your camera** to ensure higher quality sound during the session. **Please ensure your audio and camera remain off** throughout the entire presentation.
- To **ask questions** during the session, please use the **Zoom Q&A function** or **Raise Hand function**.
- If you have a technical issue during the session, please use the **chat** feature.
- We will **answer questions throughout the session** as time allows.

LAND ACKNOWLEDGEMENT

We acknowledge that UBC's two main campuses are located on the traditional, ancestral and unceded territories of the [x^wməθk^wəy'əm](#) (Musqueam) and [Syilx](#) (Okanagan) peoples, and that UBC's activities take place on Indigenous lands throughout British Columbia and beyond.

INTEGRATED RENEWAL PROGRAM

Absence Call-in Event

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Nov 18th, 2020



WELCOME



TODAY'S AGENDA

Topic	Timing
Understanding Absences in Workday	10 mins
For employees: Actions to take to update your vacation balance	10 mins
For HR Professionals & Managers: How to make manual adjustments to absence balances	5 mins
Support and Resources Available to You	5 mins
Q&A	30 mins
	60 mins



UNDERSTANDING YOUR ABSENCE BALANCE IN WORKDAY

1) OVERVIEW OF ABSENCE BALANCE TABLE

2) UNDERSTANDING:

- CARRYOVER FORFEITED IN PERIOD
- NEGATIVE BALANCES
- TERMINATION VACATION PAYOUT



UNDERSTANDING YOUR ABSENCE BALANCE TABLE

Balances Tracked in Hours

Absence Plan	Unit of Time	Position	Beginning Year Balance	Accrued Year To Date	Absence Paid Year To Date	Beginning Period Balance	Accrued in Period	Absence Paid in Period	Carryover Forfeited in Period	Ending Period Balance	Ending Period Balance Including Pending Events	As of Period
	In Hours		As of Jan 1st			Balance as of start of the period (the dates are shown in the far right column)	Incremental accrual per period	Absence taken in period		Absence balance at the end of period		Absence period

Balances, not specific dates have been migrated to Workday.



WHAT IS “CARRYOVER FORFEITED IN PERIOD”?

Balances Tracked in Hours

Absence Plan	Unit of Time	Position	Beginning Year Balance	Accrued Year To Date	Absence Paid Year To Date	Beginning Period Balance	Accrued in Period	Absence Paid in Period	Carryover Forfeited in Period	Ending Period Balance	Ending Period Balance Including Pending Events	As of Period
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Let's walk through an example:

- An employee carried forward 175 hours' worth of vacation as on January 1, 2020, from their 2019 entitlement.
- Their 'true' absence balance or remaining balance was 50 hours (which was loaded into Workday)
- The remaining 125 hours will therefore be reflected under the column titled 'Carryover Forfeited in Period' on the Absence Balance page.

This not does mean you have lost vacation, and it does not impact your remaining 2020 entitlement.

No action to take at this stage.



Link to Knowledge Base Article: [Understanding 'Carryover Forfeited in Period'](#)



ABSENCE BALANCE TABLE (EXAMPLE)

Balances Tracked in Hours 5 items



Absence Plan	Unit of Time	Position	Beginning Year Balance	Accrued Year To Date	Absence Paid Year To Date	Beginning Period Balance	Accrued in Period	Absence Paid in Period	Carryover Forfeited in Period	Ending Period Balance	Ending Period Balance Including Pending Events	As of Period
Other Time Off	Hours		0	0	0	0	0	0	0	0	0	2020-11-01 - 2020-11-30 (Monthly)
Paid Sick Time Off	Hours		0	0	0	0	0	0	0	0	0	2020-11-01 - 2020-11-30 (Monthly)
Unpaid Personal Time Off	Hours		0	0	0	0	0	0	0	0	0	2020-11-01 - 2020-11-30 (Monthly)
Unpaid Sick Time Off	Hours		0	0	0	0	0	0	0	0	0	2020-11-01 - 2020-11-30 (Monthly)
Vacation	Hours		149.6	0	0	149.6	0	0	60.4	149.6	149.6	2020-01-01 - 2020-12-31 (Annual)
Total:										149.6	149.6	

149.6 hours of vacation balance as of Jan 1st

149.6 hours of vacation balance as of start of the period (Jan 1st)

60.4 hours discrepancy between true balance & Workday calculated absence

149.6 hours of vacation absence balance (forecasted) at Dec 31st





NEGATIVE BALANCES

Sick time for M&P Employees:

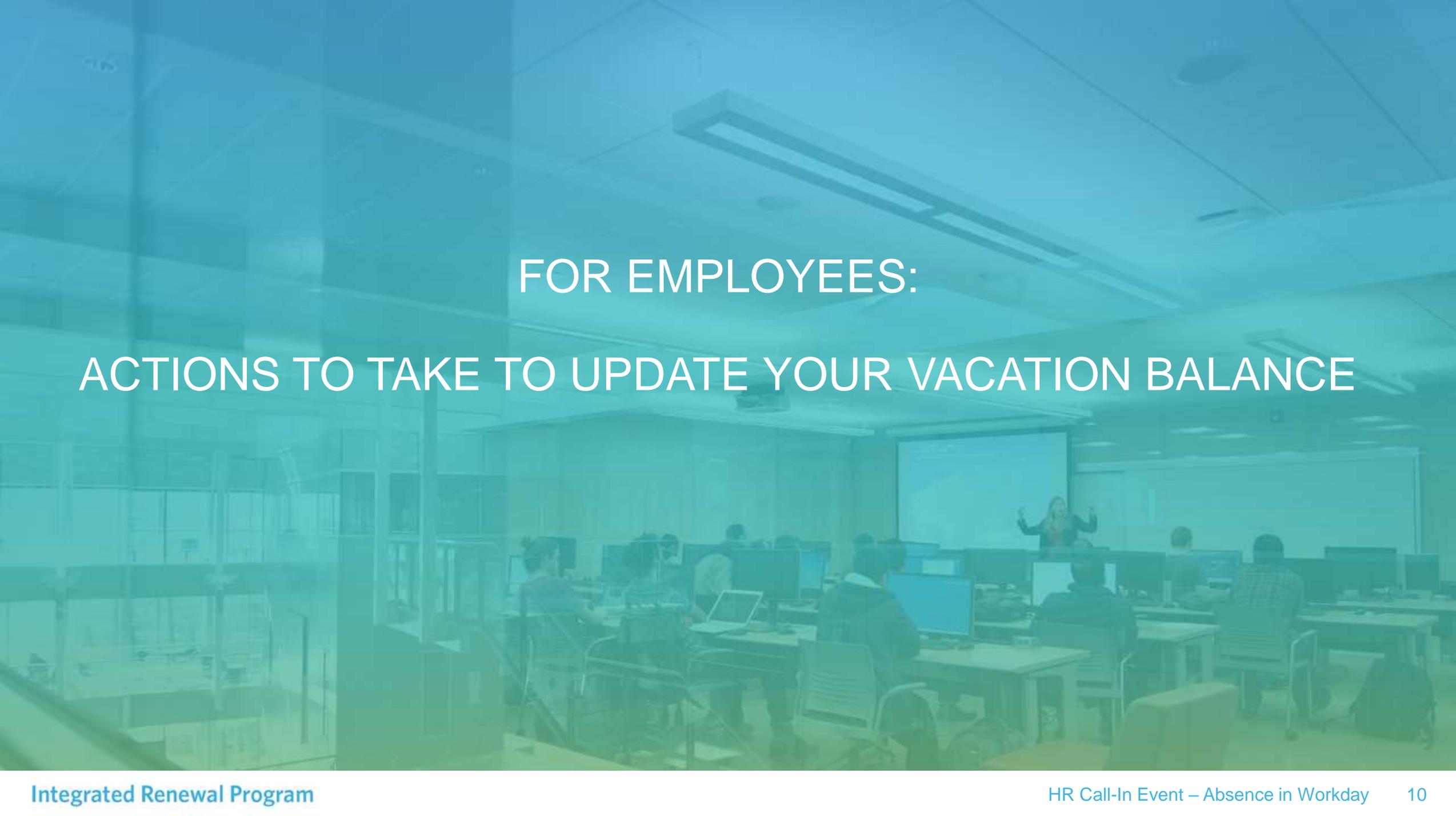
When M&P employees submitting paid sick time in Workday, absence balance may show as negative.

- This negative balance will disappear at the end of November 2020.
- The balance will show the number of hours submitted equals the hours accrued to date.

For accrued vacation from November 16 – December 31, 2020:

For hourly employees who have a vacation bank, they will be able to go into a negative balance to allow them to use vacation before they have accrued it. As they accrue vacation, their vacation balance will build out of the negative.





FOR EMPLOYEES:

ACTIONS TO TAKE TO UPDATE YOUR VACATION BALANCE

ACTIONS TO TAKE TO UPDATE YOUR VACATION BALANCE

For vacation from January 1 – November 15, 2020:

- **Do not re-enter** vacation you took between January 1, 2020 and November 15, 2020 in Workday
- Even though you cannot see this vacation in Workday, it has already been deducted from your vacation balance.

For vacation from November 16 – December 31, 2020:

- Any vacation you planned to take between November 16 and December 31 was not loaded into Workday, even if it was in legacy sources (e.g. PAT, AEP applications, Excel).
- **You will need to re-enter vacation** for this period into Workday.

Still need help?

- Work with your Manager and HR Partner to update your Workday Balance



Link to Knowledge Base Article: [Understanding your vacation balance in Workday](#)



FOR MANAGERS & HR PROFESSIONALS: HOW TO MAKE MANUAL ADJUSTMENTS TO ABSENCE BALANCE



FOR MANAGERS & HR PROFESSIONALS: MAINTAIN TIME OFF PLAN OVERRIDE

The screenshot shows the Workday system interface for a manager. The main header displays 'Sal Salaried' and 'Change Job Extention (UBCV) - TEST'. A navigation menu on the left includes options like 'Summary', 'Overview', 'Job', 'Compensation', 'Benefits', 'Pay', 'Time Off', 'Contact', 'Personnel', and 'Career'. An 'Actions' dropdown menu is open, listing various tasks. The 'Maintain Time Off Plan Override Balances' option is highlighted with a red rectangular box. Other visible options in the dropdown include 'View Time Calendar', 'Enter Absence', 'Correct Absence', 'View Time Off', 'Overtime Requests', 'View Schedule for Worker', 'Add Time Clock Event', 'View Time Clock History', 'View Time Off Balance', 'View Time Off Results by Period', 'View Calculated and Override Balances', 'View Carryover Balances', 'Place Worker On Leave', 'View Leave Results', 'Adjust Calculated Time', 'Maintain Accrual and Time Off Adjustments/Overrides', 'Maintain Accrual and Time Off Limit Overrides', 'Maintain Time Off Plan Carryover Overrides', 'Assign Work Schedule', and 'Schedule History for Worker'.

Q: When to use it?

A: To update the employee's current short-term absence balances, e.g. Vacation, Sick and Banked Overtime.

Any time off taken after the balance has been overridden will be deducted from the balance going forward.

Note: for 2020, if balances need to be updated, this is the task to use for most employees

Link to Knowledge Base Article: [Maintain Time Off Plan Override Balances](#)





FOR MANAGERS & HR PROFESSIONALS: MAINTAIN TIME OFF PLAN OVERRIDE

The screenshot displays the Workday user interface for a manager. At the top, it shows the employee name 'Sal Salaried' and the role 'Change Job Extention (UBCV) - TEST'. A navigation menu on the left lists various HR functions. The 'Actions' menu is open, showing a list of options. The option 'Maintain Time Off Plan Override Balances' is highlighted with a red rectangular box. Other visible options in the 'Actions' menu include: View Time Calendar, Enter Absence, Correct Absence, View Time Off, Overtime Requests, View Schedule for Worker, Add Time Clock Event, View Time Clock History, View Time Off Balance, View Time Off Results by Period, View Calculated and Override Balances, View Carryover Balances, Place Worker On Leave, View Leave Results, Adjust Calculated Time, Maintain Accrual and Time Off Adjustments/Overrides, Maintain Accrual and Time Off Limit Overrides, Maintain Time Off Plan Carryover Overrides, Assign Work Schedule, and Schedule History for Worker.

Vacation

- Hourly: there is no impact/change to their accruals.
- Salaried: overriding the vacation balance changes their balance for the remainder of the year, and there are no further accruals.

Sick

- For all employees who are eligible paid sick time off, there is no impact/change to their accruals.
- M&P employees: this only applies to their first year of service while they accrue sick time. After their first year of hire, employees will see 0 for paid sick.

Banked Overtime

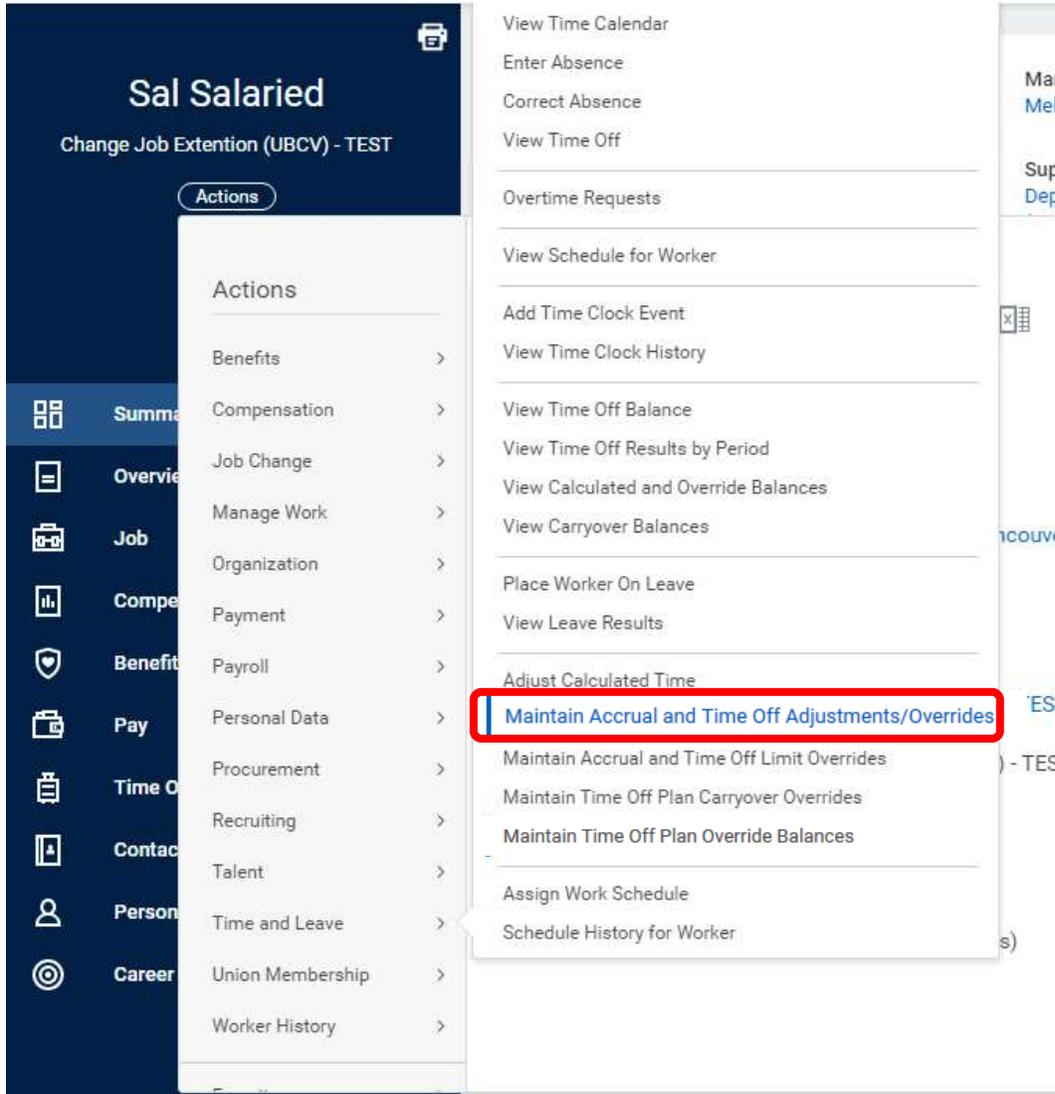
- For all employees who are eligible to bank overtime, there is no impact/change to future banks.

Link to Knowledge Base Article: [Maintain Time Off Plan Override Balances](#)





FOR MANAGERS & HR PROFESSIONALS: MAINTAIN ACCRUAL AND TIME OFF ACCRUALS/OVERRIDES



Q: When to use it?

A: All vacation accruals are calculated per position and based on the employee’s UBC hire date and entitlement rules. In some instances when there is a change to an employee’s position(s), an adjustment to the vacation accruals may be required to bring the accruals in line with the new position’s vacation eligibility.

Salary vacation entitlements are front loaded, and therefore may require manual intervention. The Maintain Accrual and Time Off Adjustment/Overrides task in Workday allows departments to adjust employee accruals manually as either a standalone task or as a sub process.

Link to Knowledge Base Article: [Maintain Accrual and Time Off Accruals/Overrides](#)



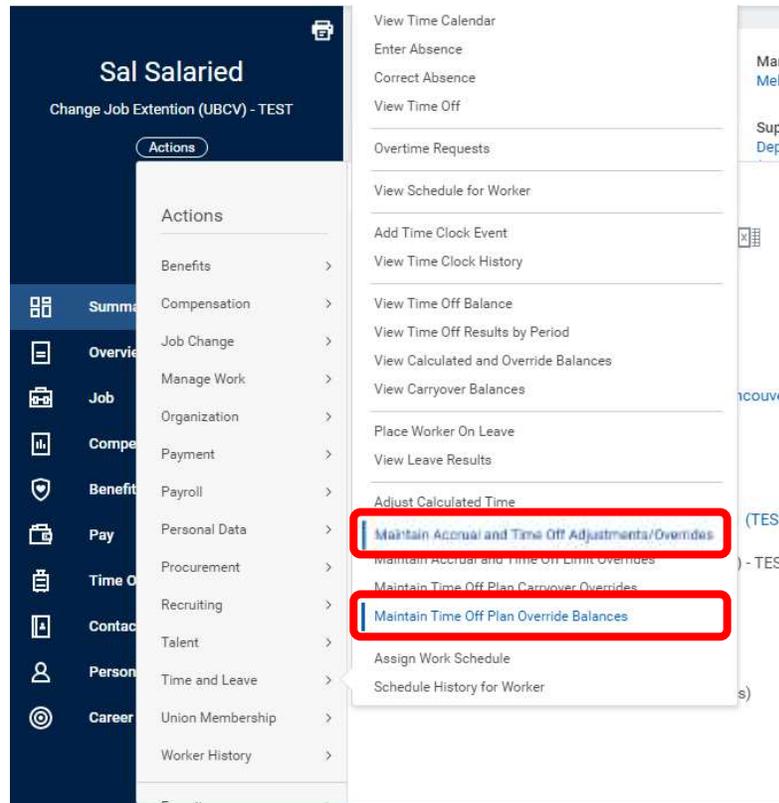


FOR MANAGERS & HR PROFESSIONALS: TERMINATION VACATION PAYOUT - PRE/POST 2021

Nov – Dec 2020

2021 -

Manual adjustment is needed to ensure vacation payout amounts are correct (via Maintain Time Off and Accrual Adjustment) for termination in 2020.



In 2021, automatic calculation will resume for terminated employees.





FOR MANAGERS & HR PROFESSIONALS: TERMINATION VACATION PAYOUT

If the employee has already been terminated, you can review vacation payout for employees by clicking on **Termination Adjustments tab** (appear on Maintain Accrual and Time Off Adjustment/Override screen once the termination has been processed in Workday).

Maintain Accrual and Time Off Adjustments/Overrides

Adjustments

Overrides

Automated Adjustments

Termination Adjustments

Termination Adjustments 1 item

Time Off	Units	Unit of Time	Period	Reference Date	Position	Termination Event
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SUPPORT & RESOURCES AVAILABLE TO YOU

RESOURCES

- Review relevant Knowledge Base articles on the UBC Self-Service portal:
 - [Workday This Week](#)
 - [How do I view my vacation balance](#)
 - [Understanding your vacation balance in Workday](#)
 - [Absence Balance: Understanding “Carryover Forfeited in Period”](#)
 - [Maintain Accrual and Time Off Accruals/Overrides](#)
 - [Maintain Time Off Plan Override Balances](#)
- View the presentation and recording from this session and sign up for other office hours, events and training on the IRP website:
<https://irp.ubc.ca/office-hours-events>





RELEVANT REPORT ON ABSENCE

Here are some useful report on Absence in Workday & corresponding security access:

Report Name	Report Description	Security Role(s)
Worker on Leave	This report provide a list of all employees on leave	<i>Depending on the leave type</i> Manager Senior HR/FR Partner
Workers Returning from Leave	This reports shows workers that are due to return from leave	HR Admin, HR Exec, HR Analyst, HR Partner, Central HR, Absence Partner
Vacation Liability by Employee	This report shows the vacation payout liability per employee	
Time Off Results Summary	This report shows, by organization and worker, the high-level breakdown of time off balances, accrued YTD and absence taken YTD	Manager Senior HR/FR Partner, Benefits Partner, HR Admin, HR Exec, HR Analyst, HR Partner, Central HR, Absence Partner
Time Off Results Detail	This report shows, by organization and worker, the detailed breakdown of time off balances, accrued YTD and absence taken YTD	Payroll, HR Auditor





MAINTAIN ACCRUAL AND TIME OFF ACCRUALS/OVERRIDES

When this business process is used:

As a standalone process to adjust or override an employee's current accrual plan (i.e. Vacation and Sick)

The 'Maintain Accrual and Time Off Adjustments/Override' To Do step is a sub-process of the following HCM Business Processes:

- [Add Job, End Job](#)
- [Change Job: Transfer](#) (to a new Employment group i.e. Moving from BCGEU-O to M&P)
- [Change Job: Promotion](#) (to a new Employment group i.e. Moving from BCGEU-O to M&P)
- [Change Job: Reclassification](#) (to a new Employment group i.e. Moving from BCGEU-O to M&P)

When this business process can be 'skipped':

The 'Maintain Accrual and Time Off Adjustments/Override' To Do step will appear as a sub process on all 'Job Change' Business Processes, however there are instances in which this step can be skipped as there is no impact to the employees' vacation:

Data Changes : [Change Location](#), [Change Job Details](#) and [General FTE Change](#)

[Change Job: Reappointment](#), [Change Job: Extension](#)

[Change Job: Transfer](#) (within the same Employment group and/or same department)

[Change Job: Promotion](#) (within the same Employment group and/or same department)

[Reclassification](#) (within the same Employment group and/or same department)

When to use an alternate Business Process

To update an employee's current balance (not their accruals) of their short-term absences, such as Vacation, Sick and Banked Overtime, see the [Maintain Time Off Plan Override Balances](#) task.





Q&A