Workday for Staff Overview

UBC is implementing a new human resources and finance system called Workday, with a vision of streamlining processes and creating a collaborative work environment for faculty, staff and students. Workday will go-live on November 2, 2020.

IMPORTANT NOTICE: ⚠️
Starting in November, students and hourly staff will be paid on the 15th and last day of each month, in alignment with how salaried staff are paid at UBC today. Ensure you know and adhere to go-live deadlines.

Here are the top five changes you will see with the new system, and how you prepare for Workday.

What are the Top 5 Changes with Workday?

1. UPDATING PERSONAL INFORMATION
   - After go-live, you will no longer use paper forms and systems, e.g., time tracking and personal data forms.
   - All personal information will be accessible through your Workday personal profile including bank information, personal contact information and pay and tax details.
   - You can view your Faculty or Unit’s organization chart in Workday.

2. UPDATING BENEFITS AND PENSION
   - You can enroll, make changes and view your benefits in Workday, e.g., add and remove dependents or change a beneficiary. A benefits partner and central HR may also make changes on your behalf.
   - If there is an impact to your job (such as a job change), Workday will automatically send you a task to update your benefits (if applicable), e.g., new benefit group.
   - In most cases, like in HRMS, you are automatically enrolled in pension plans. In exceptional cases, a Pension Partner may be required to support this process (eligibility for multiple pensions or situation less than 12 months).

3. TIME TRACKING AND ABSENCE
   - Hourly staff enter their time directly into Workday.
   - Workday automatically makes calculations for hourly staff including minimum hours, overtime thresholds, statutory holidays and more.
   - Absence tracking for all staff will be managed via Workday and replaces the Personal Absence Tracker (PAT) system and other absence tracking systems (e.g., spreadsheets).
   - For faculty, Workday will be used for leave tracking only.
   - Time tracking can be entered on the mobile app.

4. BUYING GOODS AND SERVICES
   - At go-live, a catalogue of approved vendors will be available in Workday through a "punch out catalogues similar to an online shopping cart experience. This will include the following vendors - Microserve, Staples and Staples Bulk Paper, VWR, Fisher Scientific, and Praxair.
   - Any goods and services ordered over $3,500, unless exempt, will still require a purchase order (PO). For further information about procurement policy and process, please see here.
   - A purchase requisition will need to be initiated in Workday. Workday automatically sends purchase requisitions through for review, approval and purchase order creation.
   - If a request for quotation (RFQ) is required, the buyer(s) supporting your faculty/unit will initiate the RFQ process for you.
   - A vendor is referred to as a supplier in Workday.
   - The online supplier registration form in Workday will replace the new vendor request form, which can be sent to and completed by the supplier.

5. PAYING FOR GOODS AND SERVICES
   - Post go-live, all invoices can only be entered by Financial Operations.
   - Once goods or services are received, Workday will compare the receipt, invoice and purchase order. If all details are matching, Workday will automatically approve the payment.
   - Application of taxes and tax rules are embedded within Workday.
What’s Not Changing?
- Job postings will continue to appear on the UBC Careers website for staff recruitment.
- Most goods and services ordered over $3,500 will still require a purchase order (PO).

What do I need to do to prepare?
- Ensure you know and adhere to go-live deadlines
- Complete applicable training in advance of go-live
  - Workday Basics: to learn how to navigate the Workday online environment (~45 minutes)
  - Workday HR 101 for Student and Hourly Employees: to learn about key HR concepts in Workday (~60 minutes)
  - Workday HR 101 for Salaried Staff: to learn about onboarding, absence and benefits (~90 minutes)
  - These courses include the following tasks (reference guides linked):
    - Entering time
    - Requesting an absence
    - Viewing and updating personal information
    - Updating emergency contact
    - Viewing and updating payment and tax elections
- Connect with your Manager to get the latest news about the transition to Workday
- Sign up for the IRP newsletter and share IRP updates regularly with your teams
- Attend upcoming IRP Call Ins (or watch recordings) about preparing for go-live

Job Aids
Access and search all Job Aids [here].
- Updating Personal Information
- Enrolling in Benefits & Pension
- Updating Beneficiaries
- Time Tracking & Absence
- Buying Goods and Service – Catalogue | Non-Catalogue
- Paying for Goods and Services – Catalogue | Non-Catalogue
- Viewing Your Payslip

What to Expect?
Before Go-Live
- All the latest information on the Integrated Renewal Program, including important dates, FAQs and other communications materials, is available to all on the IRP website.

After Go-Live
- Additional support for questions, issues, and requests will be available through the Integrated Service Centre (ISC) post go-live. Once Workday launches, the current IT self-service portal will become UBC’s self-service portal, providing access to Workday support.
- Note that after go-live, the ISC will provide how-to support for the following myWorkday tasks:
  - Benefits / Pensions
  - Internal Job Postings
  - Pay & Tax Withholdings
  - Personal Info
  - Time Off & Leave
  - Time Tracking / Timesheet
  - Travel & Expenses
  - Workplace Learning & Professional Development