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.
We acknowledge that UBC’s two main campuses are located on the traditional, ancestral and unceded territories of the xʷməθkʷəy̓əm (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

Sam McLaughlin, Director, HCM Transformation
Catriona Larkin, Absence SME
Kent Matthewson, Time Tracking SME
Mike McCluskie, HCM OCM Lead
Yipu Guo, HCM Sr Training Specialist

Nov 18th, 2020
WELCOME
## TODAY’S AGENDA

<table>
<thead>
<tr>
<th>Topic</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understanding Absences in Workday</td>
<td>10 mins</td>
</tr>
<tr>
<td>For employees: Actions to take to update your vacation balance</td>
<td>10 mins</td>
</tr>
<tr>
<td>For HR Professionals &amp; Managers: How to make manual adjustments to absence balances</td>
<td>5 mins</td>
</tr>
<tr>
<td>Support and Resources Available to You</td>
<td>5 mins</td>
</tr>
<tr>
<td>Q&amp;A</td>
<td>30 mins</td>
</tr>
<tr>
<td></td>
<td>60 mins</td>
</tr>
</tbody>
</table>
UNDERSTANDING YOUR ABSENCE BALANCE IN WORKDAY

1) OVERVIEW OF ABSENCE BALANCE TABLE

2) UNDERSTANDING:
   - CARRYOVER FORFEITED IN PERIOD
   - NEGATIVE BALANCES
   - TERMINATION VACATION PAYOUT
Balances, not specific dates have been migrated to Workday.
WHAT IS “CARRYOVER FORFEITED IN PERIOD”? 

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.

Link to Knowledge Base Article: Understanding 'Carryover Forfeited in Period'
## ABSENCE BALANCE TABLE (EXAMPLE)

<table>
<thead>
<tr>
<th>Absence Plan</th>
<th>Unit of Time</th>
<th>Position</th>
<th>Beginning Year Balance</th>
<th>Accrued Year To Date</th>
<th>Absence Paid Year To Date</th>
<th>Beginning Period Balance</th>
<th>Accrued in Period</th>
<th>Absence Paid in Period</th>
<th>Carryover Forfitted in Period</th>
<th>Ending Period Balance</th>
<th>Ending Period Balance Including Pending Events</th>
<th>As of Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Time Off</td>
<td>Hours</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2020-11-01 - 2020-11-30 (Monthly)</td>
</tr>
<tr>
<td>Paid Sick Time Off</td>
<td>Hours</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2020-11-01 - 2020-11-30 (Monthly)</td>
</tr>
<tr>
<td>Unpaid Personal Time Off</td>
<td>Hours</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2020-11-01 - 2020-11-30 (Monthly)</td>
</tr>
<tr>
<td>Unpaid Sick Time Off</td>
<td>Hours</td>
<td></td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2020-11-01 - 2020-11-30 (Monthly)</td>
</tr>
<tr>
<td>Vacation</td>
<td>Hours</td>
<td></td>
<td>149.6</td>
<td>0</td>
<td>149.6</td>
<td>149.6</td>
<td>0</td>
<td>0</td>
<td>60.4</td>
<td>149.6</td>
<td>149.6</td>
<td>2020-01-01 - 2020-12-31 (Annual)</td>
</tr>
</tbody>
</table>

**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**
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

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 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
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
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

<table>
<thead>
<tr>
<th>Nov – Dec 2020</th>
<th>2021 -</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manual adjustment is needed to ensure vacation payout amounts are correct (via Maintain Time Off and Accrual Adjustment) for termination in 2020.</td>
<td>In 2021, automatic calculation will resume for terminated employees.</td>
</tr>
</tbody>
</table>
For Managers & HR Professionals: Termination Vacation Payout

If the employee has already been terminated, you can review vacation payout for employees by clicking on the 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
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
Here are some useful reports on Absence in Workday & corresponding security access:

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Report Description</th>
<th>Security Role(s)</th>
</tr>
</thead>
</table>
| Worker on Leave                    | This report provides a list of all employees on leave.                             | Depending on the leave type
|                                    |                                                                                    | Manager
|                                    |                                                                                    | Senior HR/FR Partner
|                                    |                                                                                    | HR Admin, HR Exec, HR Analyst, HR Partner, Central HR, Absence Partner |
| Workers Returning from Leave       | This report 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.                      | Manager
|                                    |                                                                                    | Senior HR/FR Partner, Benefits Partner,
|                                    |                                                                                    | HR Admin, HR Exec, HR Analyst, HR Partner, Central HR, Absence Partner |
| 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 | Payroll, HR Auditor |
| Time Off Results Detail            | This report shows, by organization and worker, the detailed breakdown of time off balances, accrued YTD and absence taken YTD |
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.