# Payroll Working Group Meeting Minutes

Date: February 20, 2025

Time: 3 – 4 p.m.

Microsoft Teams Meeting

Welcome & Roll Call

## New release updates – Sri Kamarthi

* Workday’s biannual release WD2025R1 is on March 15
* Lock Pay Group for Auditing
  + New task ***Update Pay Group Lock Status*** is available for Payroll Partners to lock selected pay groups
  + This will cause any pay results for workers in the pay group to be “In Progress” stage even when there is an impacting event
    - Pay result will not automatically move to “Requires recalculation” status
  + The security for this task is same as “Run Pay Calculation”

Q: Will locking a pay group prevent the payroll from being completed?

A: No, it only prevents any changes to the payroll from occurring. The changes would not be calculated until the next retro pay calculation runs

## Search Period field by Date Ranges

* + Month. Enter any month name or abbreviation to display pay periods that start or end in the specified month. Workday can capture some misspellings. Example: You enter January, Workday returns January pay periods.
  + MM/YYYY. Displays only periods that started or ended in that month and year.
  + MM/DD/YYYY. Displays only periods that started or ended on, or crossed over, that specific day, month, and year.
  + MM/YYYY and Period Schedule name. Only periods that match both the date criteria and the period schedule name display. This method refines your search to the most specific results.
  + YYYY. Displays only periods that started or ended in that year.

## Assign Costing Allocation Redesign

* + New tabs for Proposed and Existing costing allocations
  + Side panel that has costing allocation intervals
  + New buttons for Add and Delete

## Benefits and Pay Hub

* + New buttons to access the tasks
    - Federal Withholdings
    - State/Local Withholdings

## Two new standard reports are available

* + Payroll Pay Group Summary: To view a high-level summary of Workers, Results, Gross Pay and Net Pay based on the Pay Group Details and Periods
  + Payroll Pay Component Summary: To view a high-level summary of Workers, Results, Result Lines, and Result Line Amount for the Pay Components based on the Pay Group Details and Periods

## Payroll Partner Access – Sri Kamarthi

* Payroll Partners currently have access to create/edit/delete Payroll Action Reason that are used in on demand, manual and reversals
* This will be updated to remove access as we had incidents in the past where the action reasons were changed by mistake
* Any changes to the action reasons will be done by the Workday Services team after discussions with the working group

## Access to Pay Rate Type:

* Payroll Partners currently have access to create/edit/delete Pay Rate Type
* This access is combined with the access to create Batch IDs
* There were incidents where pay rate type was changed by mistake which led to downstream impacts to our reporting system. This has occurred around 5 times since we started using Workday
* Payroll Partner access is widely used and some of the role assignees are student workers
* To minimize issues, the access to create Batch IDs will be limited to specific payroll partners (1 or 2) at each member

**Do you support updating Payroll Partner access to remove create/edit/delete Payroll Action Reason and Pay Rate Type access?**

Vote: Y – 11, N - 1

## Costing Allocation Self-Service Access – Sri Kamarthi

* Received a request to add self-service access for employees to view their costing allocations
* If the employee is working on multiple projects/departments, it gives them a quick way to review how their current allocations are set up
* Can be enabled for interested members (Opt-in/out) if needed.

## Workers Located Out of State – Texas Report – Scott Ritter

* Request to add/move the following fields:
  + Position ID
  + Job Profile Name
  + Position Worker Type
  + Hire Date
  + Termination Date
  + Retirement Date
  + Date of Death
  + Worker’s Manager
  + Primary Home Address is Outside US
  + State Withholding column moved to after Mailing State
  + Hours Worked

A screenshot of a computer

AI-generated content may be incorrect.

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AI-generated content may be incorrect.

## EIB Due Dates – Scott Ritter

|  |  |
| --- | --- |
| **Pay Date** | **Due Date for Completed EIB Template** |
| March 7, 2025 | Thursday February 27, 2025 |
| March 21, 2025 | Tuesday March 11, 2025 |
| April 1, 2025 | Thursday March 13, 2025 |
| April 4, 2025 | Thursday March 27, 2025 |
| April 18, 2025 | Thursday April 10, 2025 |
| May 1, 2025 | Wednesday April 16, 2025 |

* The minimum is close to 50 as possible
* An authorized individual is the one submitting the Request for Mass Load (EIB) form on the Workday Help Website
* Please do not alter the formatting or add formulas to the spreadsheet

**Pre-Payroll Dashboard – Andrew Branch**