

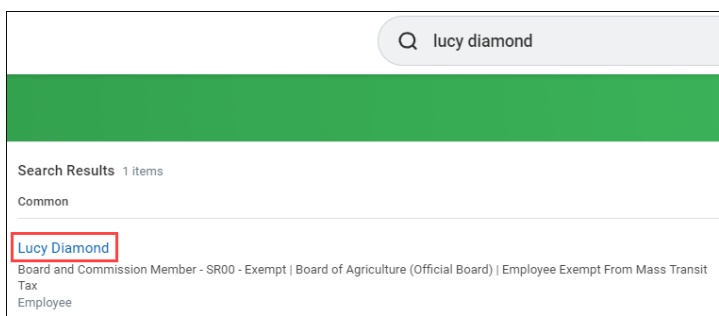
Compensation Change, board member

This job aid provides Board Administrator Partners step by step instructions on how to change compensation for a board member.

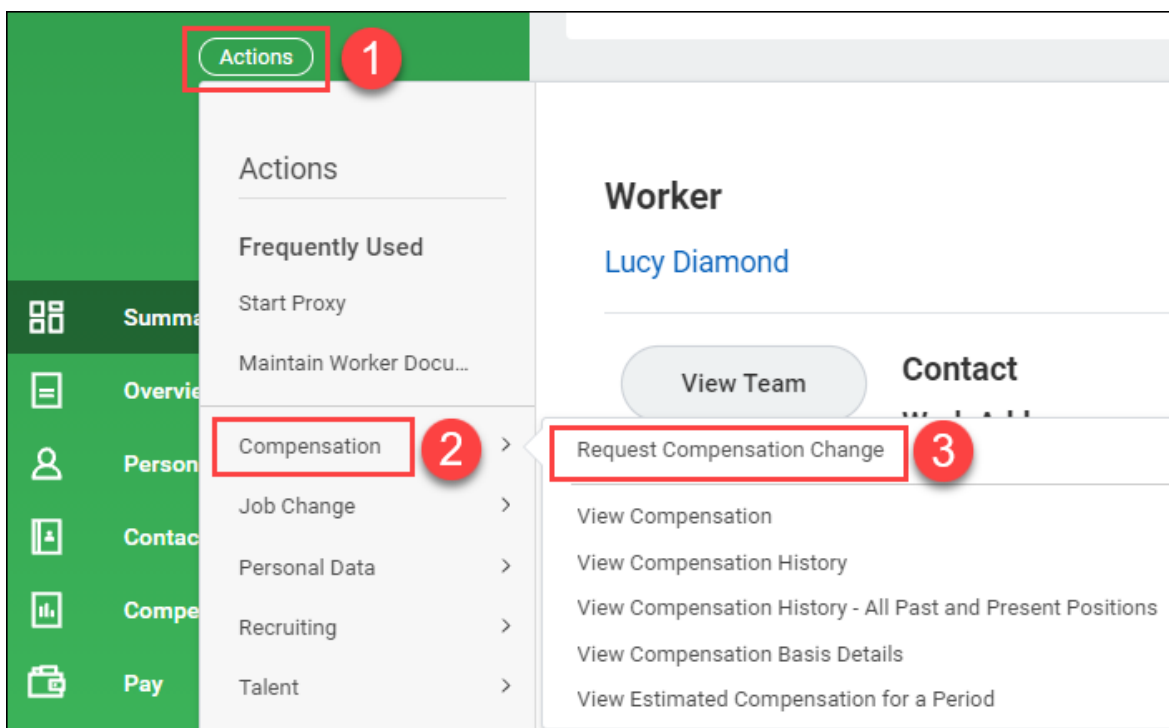


Actions *Effective Dated* prior to the date hook (more than 6 months prior to today's date), will need to be manually integrated to Payroll (OSPA). For these actions, create a Workday Help case with the specific action information – such as effective date and a brief description of what you processed.

Step 1: Enter the board members name or OR# in the search field, hit enter and select them from the search results.



Step 2: If the employee has more than one position, select the appropriate position. To start the action, click **Actions** (1), hover over **Compensation** (2), and select **Request Compensation Change** (3).



Step 3: Enter the **Effective Date*** of the change. If the employee has more than 1 position, select the position the allowance is related to.

*The **Effective Date** is the date you want the change to take effect. If you are doing a retroactive change you will need to:

- a) make sure to correct any other compensation actions with future dates to this one;
- b) if the action is effective dated prior to the date hook (more than 6 months prior to today's date), it will need to be manually integrated to Payroll (OSPA). For these actions, create a Workday Help case with the specific action information – such as effective date and a brief description of what you processed.

Click **OK**.

Step 4: Click the pencil icon in the *Effective Date & Reason* section. Click on the menu prompt to select the **Reason** for the change. Select **Request Compensation Change > Base Salary Change** and then **Base Salary Change > Compensation Structure Change**.

Step 5: If the Guidelines box is empty, click the pencil icon to add the following information. Note: You will not be able to add the stipend in the Salary box unless this step is completed first. Click on the Compensation Package menu prompt and select **General Compensation Package** (1). Click on the Grade menu prompt and select **From Job Profile > 00** (2). Click on the Grade Profile menu prompt and select **B-00-AE** (3). Click on the check mark to save (4).

Guidelines

Total Base Pay Range
(empty)

↶
✓

4

Compensation Package *

×
General Compensation Package

☰

1

Grade *

×
00

☰

2

Grade Profile

×
B-00-AE

☰

3

Step

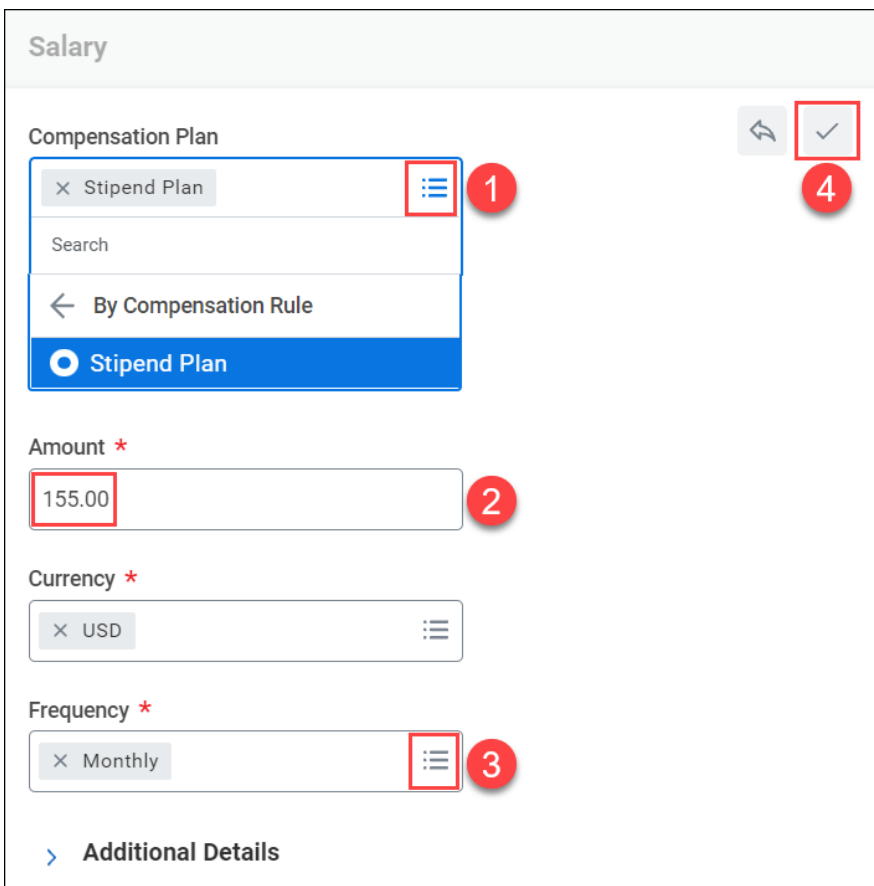
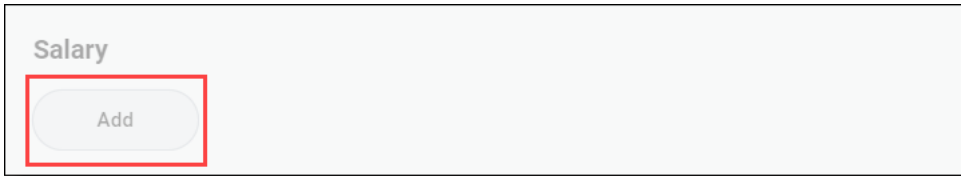
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Progression Start Date

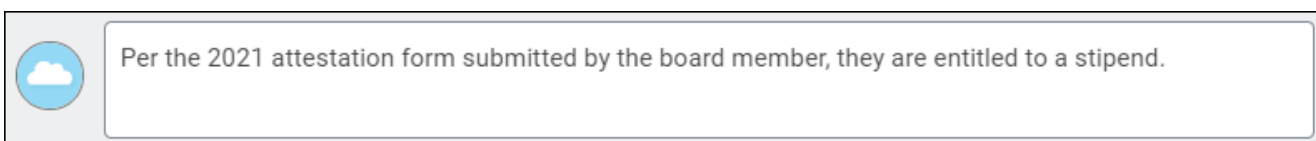
MM/DD/YYYY

📅

Step 6: Scroll down to the Salary box and click on **Add**. Click on the Compensation Plan menu prompt and select **By Compensation Rule**, and then select **Stipend Plan** (1). Enter the dollar **Amount** of the stipend (2). This amount will vary by board and may change or need to be removed based on legislative action or future attestation forms. For this example, we have selected \$155.00. Set the Frequency to **Monthly** (3). *Note: This will override any amount entered in the Guidelines box, which should be zero. Do not set any of the dates in the Additional Details section.* Click on the check mark to save the changes (4).




Step 7: Add a comment. Click **Submit**.



Step 8: Up Next displays the review task. Click **Review**. If everything looks correct, click **Approve**. You will receive a notification that the process has *Successfully Completed*. If the action is future dated, it will not be displayed on the employee's compensation tab until the effective date.

Remove Compensation:

Follow Steps 1 - 5.



To remove the compensation as of a specific effective date (*can be retroactive, current or future dated*): Enter the *Effective Date* as the **first** day the employee will not be paid. Example: If ending 11/30 – remove effective 12/1.


Step 6: Scroll to the *Salary* box and click the **X** to remove the salary (1). The effective date displaying is the date the stipend was added (2).

Salary

Assignment Details
30.00 USD Monthly

Plan Name
Stipend Plan

Effective Date
02/21/2018

X 

1

2


The red X signifies the removal. Add any comments and click **Submit**.

Salary

Assignment Details
× 30.00 USD Monthly removed

Plan Name
Stipend Plan

Effective Date
× 02/21/2018 removed



Step 7: Up Next displays the review task. Click **Review**. If everything looks correct, click **Approve**. You will receive a notification that the process has *Successfully Completed*. If the action is future dated, it will not be displayed on the employee’s compensation tab until the effective date.