

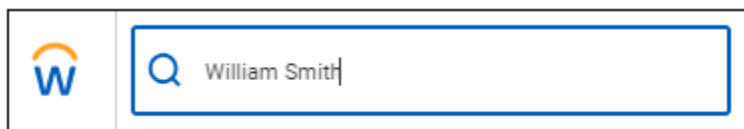
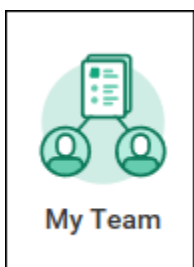
Compensation change, request


This job aid will provide Managers, HR partners, and Compensation Partners instruction on how to initiate and approve compensation change requests. Request Compensation Change is most commonly used to add/remove allowances and update/change salary. See the appropriate section for your action.

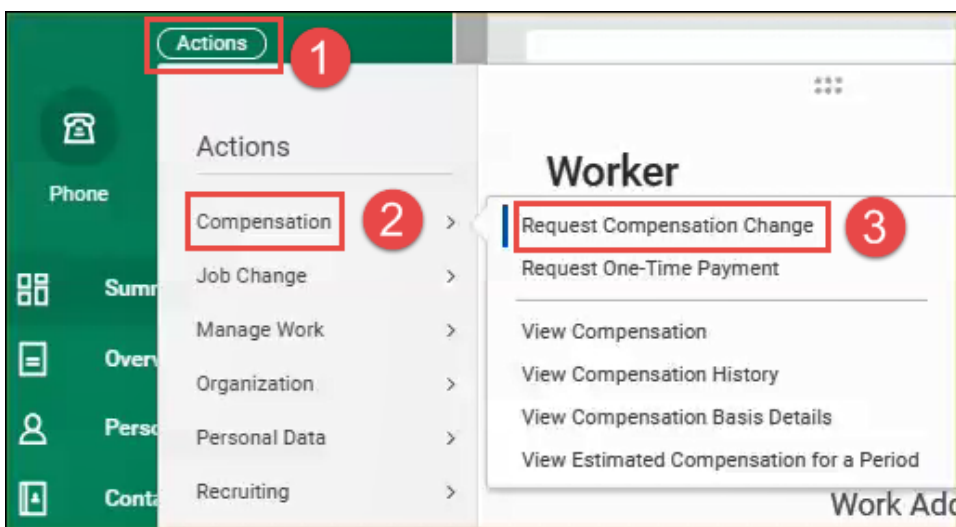


Actions *Effective Dated* prior to the date hook (more than 6 months prior to today's date), will need to be manually integrated to Payroll (OSPA). For these actions, email the Workday Helpdesk with the specific action information – such as effective date and a brief description of what you processed.

Step 1: From the **My Team** worklet select the employee you want to initiate a compensation change for. Alternatively, you can use the search field to find the employee by typing in their name.



Step 2: If the employee has 2 positions  select the appropriate position. If the additional position is for work out of class, job rotation or developmental – be sure to select the employee's base position (it will be the one without the plus (+) sign). 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 (1). If the employee has more than 1 position, select the position you want to make the change to (2).

*Note: Always select the employee’s base position when adding an allowance for someone with 2 positions due to a Job Rotation/WOC. If the employee has 2 **paid** positions, 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, email the Workday Helpdesk 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. Please select the reason that most accurately reflects the reason for the change.

BEFORE CONTINING WITH THIS JOB AID, REVIEW THE FOLLOWING:

	<p>NOTE: There are multiple actions that can be completed using “Request Compensation Change”. Please follow the link for the action you wish to take:</p> <ul style="list-style-type: none"> • Base Salary Change – On Step • Base Salary Change – Override/Off Step • Add Allowance • Update Actual End Date or End Allowance <p>To complete all actions</p>
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	<p>NOTE: For transactions such as salary reductions, follow the <i>Base Salary Change</i> steps that correlate with the employee’s compensation status (on or off step - as listed above). You will need to process a transaction for the reduction and a second transaction for the return. <i>**Do not use the salary actual end date, this will result in the removal of the employee’s salary at the end of this term.**</i></p>
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Base Salary Change – On Step:

Follow Steps 1-4.

Step 5: Click the pencil icon in the **Guidelines** box.

<p>Guidelines</p>	
<p>Total Base Pay Range 4,184.00 - 6,122.00 USD Monthly</p>	
<p>Compensation Package General Compensation Package</p>	
<p>Grade 25</p>	

Step 6: Use the menu prompts to update the *Guidelines* pay information as needed - **Grade**, **Grade Profile** and **Step**. Click the check mark to save your changes.

Guidelines

Total Base Pay Range
 4,184.00 - 6,122.00 USD Monthly

Compensation Package *
 General Compensation Package

Grade *
 25

Grade Profile
 OAS-25-AP (1)

Step
 Step 08 - 5834 USD

Progression Start Date

Step 7: Verify the **Assignment Details** in the **Salary** box match the **Step** selected in the **Guidelines** box.

Salary

Assignment Details
 2,860.00 USD Monthly

Plan Name
 Monthly Salary Pro Rated for Less than Full Time

Effective Date
 11/18/2019

Guidelines

Total Base Pay Range
 2,561.00 - 3,569.00 USD Monthly

Step
 Step 04 - 2860 USD

Progression Start Date
 11/18/2019

[Proceed to section: Completing the Compensation Change – All Actions.](#)

Base Salary Change – Off Step:


Follow Steps 1-4.

Step 5: Click the pencil icon in the **Salary** box.

Step 6: Enter the **Amount**, **Amount Change** and/or **Percent Change** you want to override the salary to. *Note: This will override any amount entered in the Guidelines box. If the worker is Off-Step the Guidelines “step box” should be blank.* Click the check mark to save your changes.

[Proceed to section: Completing the Compensation Change – All Actions.](#)

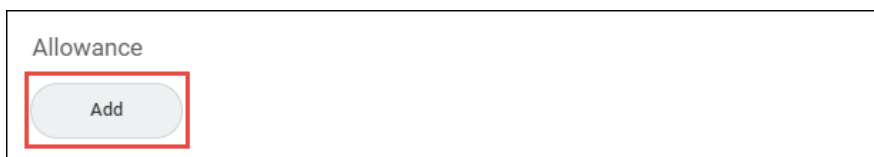
Add an Allowance:



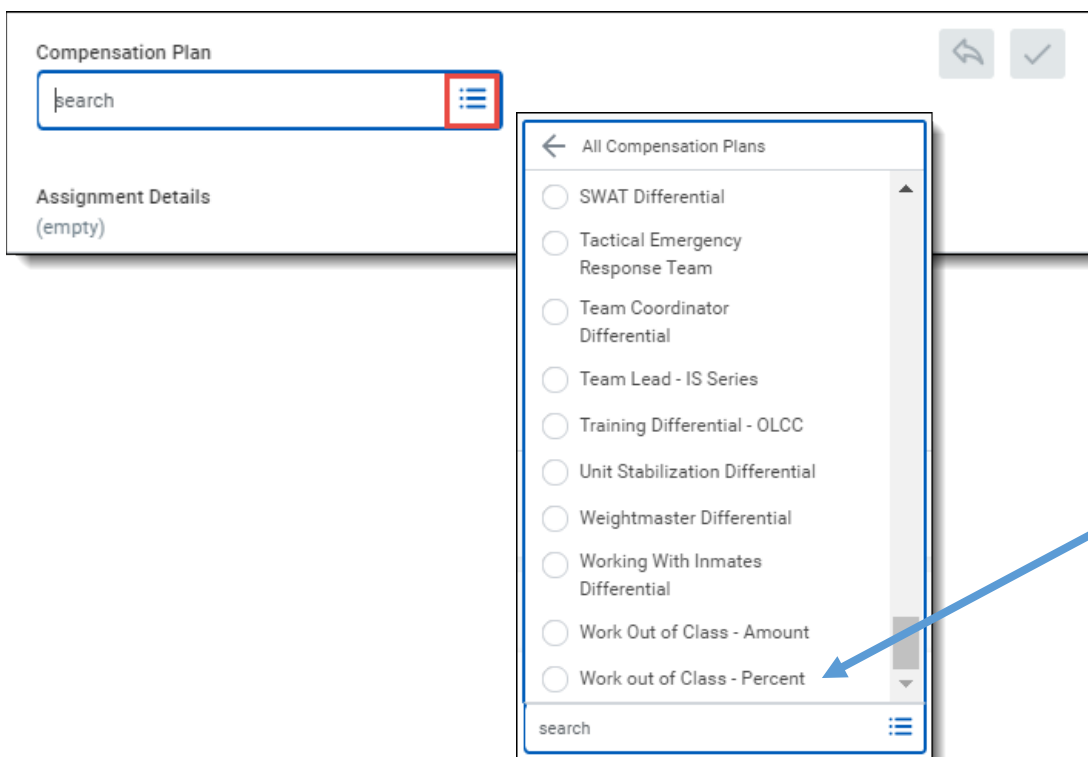
If you need to add or remove an allowance due to the addition or removal of a job rotation/WOC it is very important to view the job aids [Additional job \(Job rotation with or without WOC\), add](#) and [Additional job \(Rotation/WOC\), remove](#) first. There are multiple tasks to add and end job rotations/WOC. The Request Compensation Change is a task within the Add Additional job process and can be initiated from that process if the base and additional job are in the same agency.

Follow Steps 1-4.

Step 5: Scroll to **Allowance** and click the **Add** button.



Step 6: Click on the menu prompt to select **All Compensation Plans** and then click the appropriate allowance plan you wish to add. For this example, we'll select *Work out of Class – Percent*.



Step 7: Enter and verify the compensation **Percent** (1) or dollar **Amount** (2) – based on the allowance selected, the appropriate *Amount* or *Percent* field will open for editing. If you selected *Percent*, the *Amount* will update based on the salary and percent calculation. Click on the open prompt to open the **Additional Details** section (3).

Step 8: To automatically end the allowance on a future date, enter the **Actual End Date** of the allowance plan (this is the last date the allowance will be paid). To extend an allowance, a new request with an updated date can be submitted. This field can be left blank if you don't know the *Actual End Date*. If you only enter an Expected End Date the allowance will not automatically end, but the dates can be reported on through various reports.

If you're adding an allowance with a retroactive start and end date, do not enter an *Actual End Date*. You will need to complete a second request compensation change task following the process to retroactively end the allowance.

[Proceed to section: Completing the Compensation Change – All Actions.](#)

Update Actual End Date or End Allowance

Follow Steps 1-4.

Step 5: This step will be different depending on if you use Actual End Date and the effective date of this action.

- a) **To update a future Actual End Date (*cannot be updated retroactively*):** Scroll down to the *Allowance* section. Click on the pencil icon to edit this section. Click the open prompt next to *Additional Details*. Enter the **Actual End Date**. This will be the last day the allowance will be paid to the employee. Note: *Actual End Date* must be on or after the *Expected End Date*. Update the **Expected End Date** as appropriate.

Additional Details

Expected End Date
12 / 21 / 2019

Actual End Date
12 / 21 / 2019

- b) **To end an Allowance as of a specific effective date (*can be retroactive, current or future dated*):** To end an Allowance, enter the *Effective Date* as the **first** day the employee will not be paid. Example: If ending 11/30 – remove allowance effective 12/1. Scroll to the *Allowance* box and click the “X” to **Remove Allowance**.

Allowance

Assignment Details
5% Monthly

Plan Name
Bilingual Differential

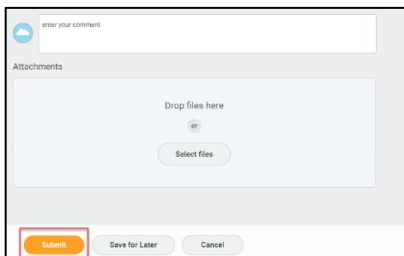
Effective Date
12/01/2019

Note: if you are adding and removing the same allowance, it will have to be done in two actions. One action to add the allowance and a subsequent request compensation change action to remove the allowance. If you are adding and removing a retroactive allowance action, the addition and removal cannot be processed in the same 24hr period or it will not integrate to payroll appropriately.

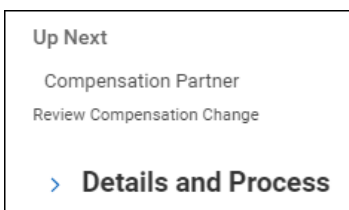
[Proceed to section: Completing the Compensation Change – All Actions.](#)


Completing the Compensation Change - All Actions:

Step 1: Add any comments or attachments (i.e. Leadwork agreement, etc.) and click **Submit**.

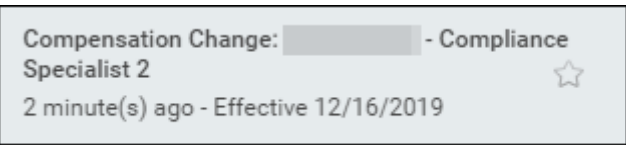


Step 2: Up next will be the *Compensation Partner*.



	<p>Note: If the action is initiated by the Compensation Partner, it will skip approval by the Compensation Partner and the Manager will receive the request for approval; Manager initiates action it will route to Compensation Partner; HR Partner initiates action it will route to the Compensation Partner and Manager.</p>
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Step 3: The Compensation Partner will receive an inbox task to review the *Compensation Change* request.



Step 4: The Compensation Partner reviews the request – new items are marked by a blue dot, removed items are marked by a red x. If you wish to approve, click **Approve**. You can also *Send Back* for more information, *Add Approvers* or *Deny* the request.

Total Base Pay

Total Base Pay
 ● 6,122.00 USD Monthly was 5,834.00 USD Monthly

Guidelines

Total Base Pay Range
 4,184.00 - 6,122.00 USD Monthly

Compensation Package
 General Compensation Package

Grade
 25

Grade Profile
 OAS-25-AP (1)

Step
 ● Step 09 - 6122 USD added
 × Step 08 - 5834 USD removed

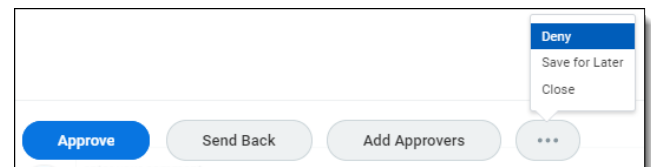
Progression Start Date
 ● 12/16/2019 was 07/01/2019

Salary

Assignment Details
 ● 6,122.00 USD Monthly was 5,834.00 USD Monthly

Plan Name
 Monthly Salary Pro Rated for Less than Full Time

Effective Date
 ● 12/16/2019 was 07/01/2019



When *Approve* is clicked, you will get notification that the process is *Successfully Completed*. If this is a future dated action, the change will not be displayed on the employee’s compensation tab until the effective date.