

# Workday Webinar: Hiring - Best Practices for Direct Hires

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# Who Do I Go to for Help?



## ISC

Why am I getting this weird error?  
I need to make a change to an offer letter; how do I edit it?  
Why does this employee's EEID start with an "E"?  
How do I create a new Supervisory Organization?  
How do I create Matrix Org?



## HR/FR

What type of transaction do I need to submit?  
What action reason do I use?  
Do I need to re-post?  
Practice & Policies  
Can I add this text to the offer letter?

# Today's Focus



**To build on your understanding of direct hire processes and share some top tips.**

- Pre-Hire records
- DeDupe tool
- Academic Appointments
- Faculty funding
- Student fellowship funding
- Updating compensation during hire
- Retroactive student hires
- Onboarding notifications

# Pre-Hires



# Pre-Hires

## What is a Pre-Hire?

A Pre-Hire is someone you track before employment. You can create Pre-Hire records, provide contact information, and track the Pre-Hire process. All employees have an active Pre-Hire record after you've hired or terminated them. You can tie this Pre-Hire record to open positions for internal transfers or rehires. Within the Hire Employee task, the Search for Person section appears and is where you can search for Pre-Hire records during the Direct Hire process.

**Purpose: To properly search Pre-Hire profiles as this is a critical step to ensure that a duplicate Pre-Hire record is not created in Workday.**

Before creating a new Pre-Hire record in Workday, please ensure that the recruiter/initiator has gathered and confirmed the following information from the desired candidate.

It is very important that the administrators collect the correct information, and **should always ask 4 questions:**

1. **SIN**
2. **Date of Birth (DOB)**
3. **Preferred/legal/alternate names**
4. **Have you worked at UBC before? (If Yes, collect more details such as Employee ID, dates, job title etc)**

# Pre-Hires

## How to do this? Best Practices?

Some departments have implemented checklists, which can help administrators and those faculty members who hire large volume of students.

Its best ensure that your department has a robust process for collecting, storing and navigating sensitive HR information.

Kindly refer to the record retention schedule as to when and how to destroy sensitive information.

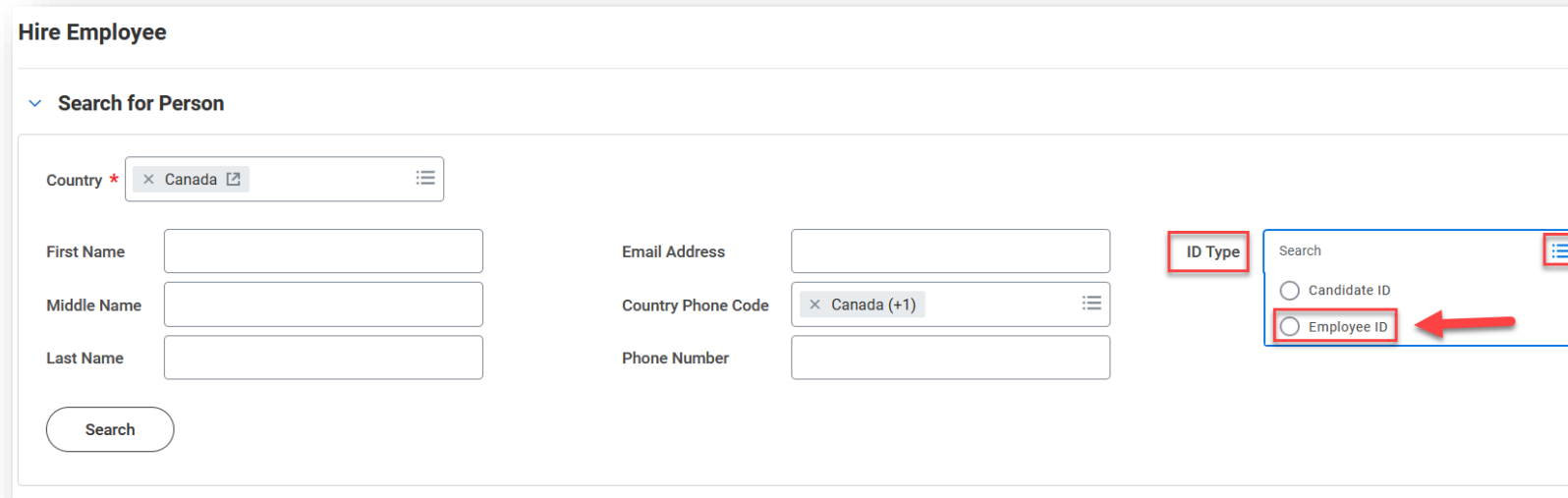
Please reference the [UBC's Office of the University Counsel - Protection of Privacy](#)



# Pre-Hires

## Tips and Trick for How to Search Pre-Hires: What to Enter

1. First name, Last name or
2. Former Employee Number, if known. Use the 'ID Type' field and select the 'Employee ID'. Enter the employee ID within the newly populated 'ID Value' field. This will ensure you populate and move forward with the correct Workday profile for the hire.



**Hire Employee**

▼ Search for Person

Country \*

First Name

Middle Name

Last Name

Email Address

Country Phone Code

Phone Number

Search

**ID Type**

Search

☐ Candidate ID

☒ Employee ID

**NOTE:** By entering more details, it will narrow down your search. But when too much information is entered, the desired profile may not populate. As an example, when an email is also included during the search, but the desired candidate has provided a different email which has not been previously used in Workday, it will cause the search results to not populate their Former Worker profile and Pre-Hire record.

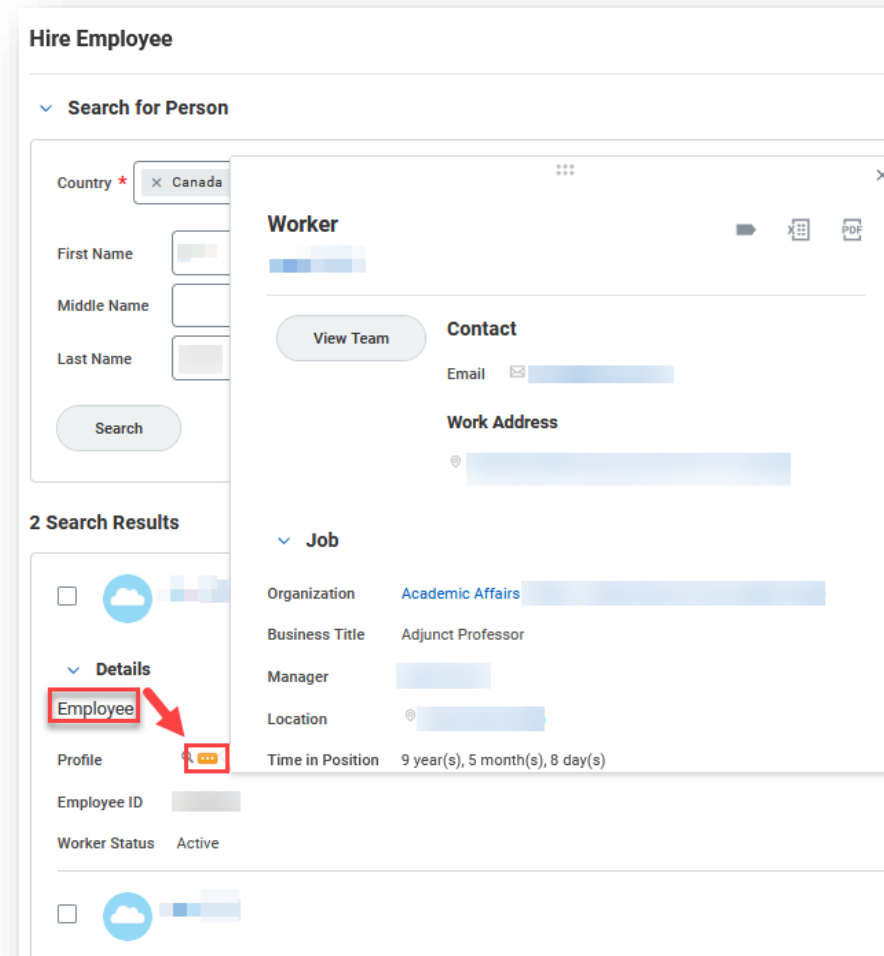
# Pre-Hires

## Tips and Trick for How to Search: Understanding Pre-Hire records, How to Read

### To prevent duplication:

1. **Search for any existing Pre-Hire records** by using Search for Person.
2. **Open and review each search result** to ensure you are selecting the correct worker Pre-Hire profile before proceeding to hire.

**Note:** To expand the details, from within the populated search results, select the blue arrow, and click on the related actions button (three dots) in the Employee Profile field, which is next to the magnifying glass icon. This will allow you to see their current or previous position details.



The screenshot displays the 'Hire Employee' interface. At the top, there is a 'Search for Person' section with a 'Country' dropdown set to 'Canada'. Below this are input fields for 'First Name', 'Middle Name', and 'Last Name', followed by a 'Search' button. The main area shows '2 Search Results'. The first result is expanded, showing a profile for a 'Worker'. The profile includes a 'Details' section with a red box highlighting the 'Employee' field and a red arrow pointing to a magnifying glass icon. The 'Job' section lists details: Organization (Academic Affairs), Business Title (Adjunct Professor), Manager, Location, and Time in Position (9 year(s), 5 month(s), 8 day(s)). The 'Contact' section shows an email field, and the 'Work Address' section shows a location field. The 'Worker Status' is listed as 'Active'.



# Pre-Hires


## Former Worker related actions vs. Pre-Hire related actions


If further confirmation and/or changes are required before moving forward and completing the hire, you can review the Pre-Hire record.

This can be done by selecting the Former Worker's Pre-Hire record, which is located on the right-hand side of their drop-down selection.

**1 Search Result**

☐





Details


Employee

Pre-Hire

Profile

Q

Employee ID



Worker Status

Terminated

Profile

Pre-Hire ID

Al

Q

See in New Tab

Copy URL

Copy Text

View Printable Version

Export to Excel

Start Hire

Create New Pre-Hire

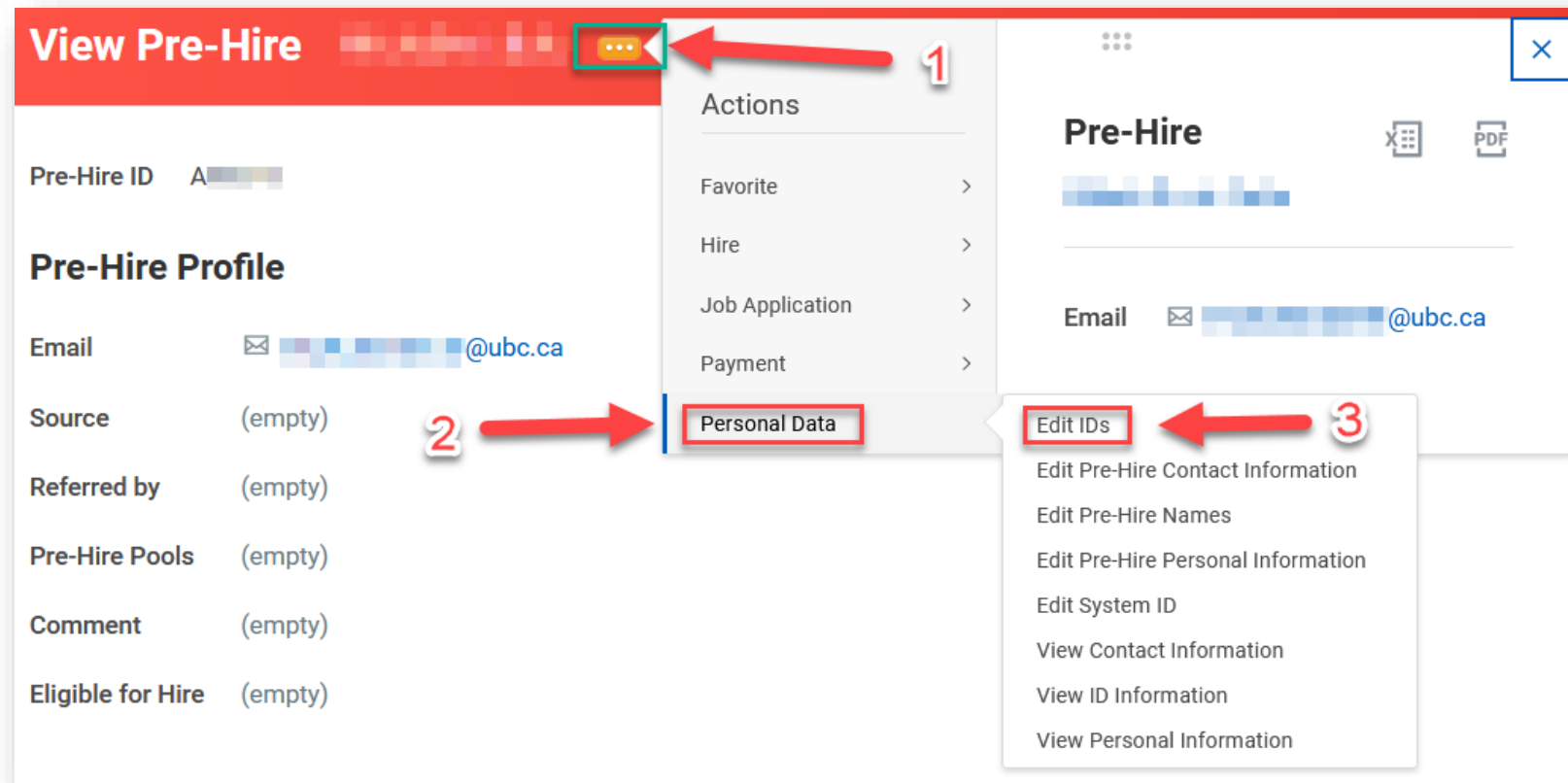
Cancel

You can navigate to the Pre-Hire record summary page by right-clicking on the magnifying glass icon, located next to the related actions button (three dots), and selecting See In New Tab. This will open a new tab in your browser, and allow you to easily toggle between the Hire Employee results section and the Pre-Hire record summary page.

# Pre-Hires

## Pre-Hire record page's related actions

From within the Pre-Hire record, the recruiter/initiator can validate or make certain changes to their candidate's record by clicking the related actions button (three dots), Personal Data and selecting the relevant choices, such as Edit IDs.



The screenshot shows the 'View Pre-Hire' interface. A red header bar at the top contains the title 'View Pre-Hire' and a three-dot menu icon. A red arrow labeled '1' points to this menu icon. Below the header, the 'Pre-Hire Profile' section displays fields for Pre-Hire ID, Email, Source, Referred by, Pre-Hire Pools, Comment, and Eligible for Hire. A red arrow labeled '2' points to the 'Personal Data' option in the 'Actions' dropdown menu. The 'Actions' menu is open, showing options: Favorite, Hire, Job Application, Payment, and Personal Data. A red arrow labeled '3' points to the 'Edit IDs' option within the 'Personal Data' sub-menu. The 'Edit IDs' sub-menu is also open, showing options: Edit Pre-Hire Contact Information, Edit Pre-Hire Names, Edit Pre-Hire Personal Information, Edit System ID, View Contact Information, View ID Information, and View Personal Information.

# Pre-Hires

## Edit ID Information for Pre-Hire

If Edit IDs is selected, it will take to you this page, where you are able to view and/or make any necessary SIN verifications, changes and/or updates.

This is most likely to occur when a Former Worker was previously employed by UBC with a work permit and now has gain permanent resident status and now has been assigned a new SIN.

The initiator, HR Analyst, HR Partner, and Senior HR Partner can all update the SIN within the Pre-Hire record.

**Edit ID Information for Pre-Hire**

Pre-Hire

Pre-Hire ID A

[National IDs](#)
[Additional Government IDs](#)
[Passports](#)
[Visas](#)
[Licenses](#)
[Other IDs](#)

National IDs 1 item

+	*Country	*National ID Type	Current ID	Add/Edit ID	Issued Date	Expiration Date	Issued By	Series	Verification Date
-	<div style="border: 1px solid #ccc; padding: 2px;"> <span style="color: red;">×</span> Canada <span style="float: right;">⌵</span> </div>	<div style="border: 1px solid #ccc; padding: 2px;"> <span style="color: red;">×</span> Social Insurance Number (SIN) <span style="float: right;">⌵</span> </div>	<span style="background-color: #ccc; padding: 2px 10px;"></span>	_ _ _	YYYY-MM-DD <span style="font-size: 0.8em;">📅</span>	YYYY-MM-DD <span style="font-size: 0.8em;">📅</span>			<div style="background-color: #ccc; width: 50px; height: 15px; margin: 0 auto;"></div> <span style="font-size: 0.8em;">📅</span>

# Pre-Hires

## What to enter when creating new Pre-Hire: Naming convention

If your hire does not appear within the Pre-Hire search results, click Create New Pre-Hire.

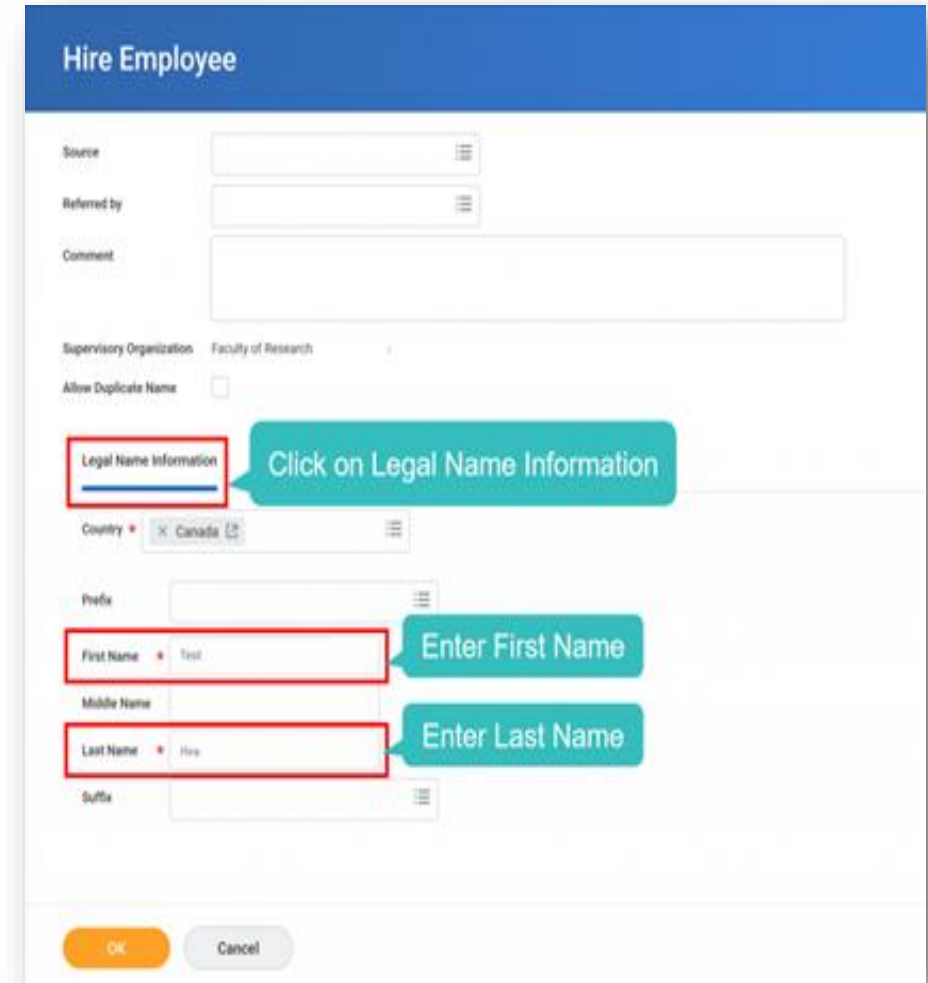
On the next Hire Employee page, click the Legal Name Information tab. The country will auto-populate to Canada. Enter the First Name and the Last Name of the new hire.

Please ensure that any name of the hire is entered with the first letter of their first and last name as capitalized and the following letters entered as lower cased.

Avoid entering names in all CAPS, all lower case or a combination of both: i.e. BRAD PITT, angelina jolie, or Jennifer ANISTON.

The standard name esthetic should appear as: **Mariah Carey**.

**Note:** The name entered here carries all the way through to the worker profile and has downstream impacts to all UBC generated ecosystems.



The screenshot shows the 'Hire Employee' form. At the top, there's a blue header with the text 'Hire Employee'. Below this, there are several input fields: 'Source', 'Referred by', and 'Comment'. The 'Supervisory Organization' is set to 'Faculty of Research'. There's a checkbox for 'Allow Duplicate Name'. A red box highlights the 'Legal Name Information' tab, with a callout bubble saying 'Click on Legal Name Information'. Below this, the 'Country' is set to 'Canada'. There are three input fields for the name: 'First Name' (containing 'Test'), 'Last Name' (containing 'Hire'), and 'Suffix'. Red boxes highlight the 'First Name' and 'Last Name' fields, with callout bubbles saying 'Enter First Name' and 'Enter Last Name' respectively. At the bottom, there are 'OK' and 'Cancel' buttons.

# Pre-Hires

Understanding the importance of selecting the correct Pre-Hire record and downstream impacts.

## 1) Pre-Hire vs DeDupe - What's the difference?

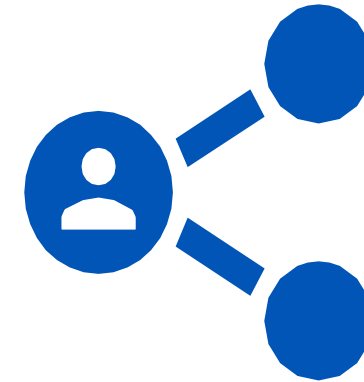
**Pre-Hire:** A Pre-Hire is a person's profile that must be created in Workday before they may be hired into the system.

vs.

**DeDupe Tool:** is used to prevent duplicate identities being created within the UBC ecosystem which can complicate an end-users' experience of accessing all of UBC systems. Ensure you are **connected to VPN** before starting this step.

**Note:** An identity is different from a user/person record. The user has already been created during the Hire process. The identity pertains to how that user is created behind the scenes and how their system access is managed.

**DeDupe won't solve Pre-Hire errors!**



# Pre-Hires

Understanding the importance of selecting the correct Pre-Hire record and downstream impacts.

## 2) Employee can't log on

This is likely due to the hire having their active CWL not linked to their Workday Employee ID/worker profile. They will need to reach out to the UBC IT help desk for assistance with merging these records together. Kindly ensure that both the CWL and their UBC Employee ID are on hand and is provided to the IT team for further action.

## 3) Has E00 EID

This occurs when the worker has a duplicate worker profile created in Workday. It is **very important** to reach out to the ISC team as soon as possible, as there is only a small window of time to have this hired profile rescinded.

Once a pay cycle has passed, rescinding is no longer possible, and the records will remain in Workday – Forever!

**Kindly call the ISC as soon as possible for swift manual intervention.**

If the ISC is required to rescind the hire business process, the department will need to reenter and complete the appointment again.



# DeDupe Tool



# DeDupe Tool

What is DeDupe? Why is it important?

## DeDupe Tool

- ✓ Used to prevent duplicate identities from being created within the greater UBC ecosystem.
- ✓ External to Workday, but integrated into Workday business processes (BPs).
- ✓ Must be on the UBC network to access. Use VPN if needed.
- ✓ Supported and maintained by the UBC Identity & Access Management (IAM) team (not ISC).

**Note: When DeDupe is not completed correctly, it may impact user access across all UBC systems!**

The selected record/identity is affiliated across the entire UBC ecosystem, including FASMail, VPN, WiFi, team shares, departmental access, etc. The worker may not be able to log into Workday with their CWL, or may be logged into the wrong user profile.

**Incorrectly affiliated records need to be rescinded by the ISC, and identities detached manually by IAM.**



# DeDupe Tool

## De-Duplication Algorithm

Attribute	Weight	Required	Search Criteria	Value Found	Result	% Score	% Score Weight
Legal Name	10	Mandatory	Dave Smith	David Smith	Partial Match	90	9
Date of Birth	5	Mandatory	01011960	01011960	Exact match	100	5
Email	10	Mandatory	davesmith@gmail.com	davesmith@gmail.com	Exact match	100	10
SIN	10	Mandatory	No SIN	90123456	No match	0	0
Employee ID	5	Optional		21232425	No match	0	N/A
<b>TOTAL</b>	<b>35</b>						<b>24</b>

**Maximum Score:** 35 points

**Percentage Accuracy calculation:** Weighted Average Score /Maximum Score\*100 rounded to the nearest integer

$$((\text{name score} * \text{name weight}) + (\text{DOB Score} * \text{DOB Weight}) + (\text{email score} * \text{email weight}) + (\text{SIN Score} * \text{SIN Weight})) / \text{Maximum Score} * 100$$

$$(90\% * 10) + (100\% * 5) + (100\% * 10) + (0\% * 10) / 35 * 100$$

$$24/35 * 100 = 69\% \text{ rounded to the nearest integer}$$

# DeDupe Tool

## De-Duplication Algorithm

**Guideline:** A threshold of 69% is recommended for considering a possible duplicate. In some cases, it may be lower depending on the matching fields.

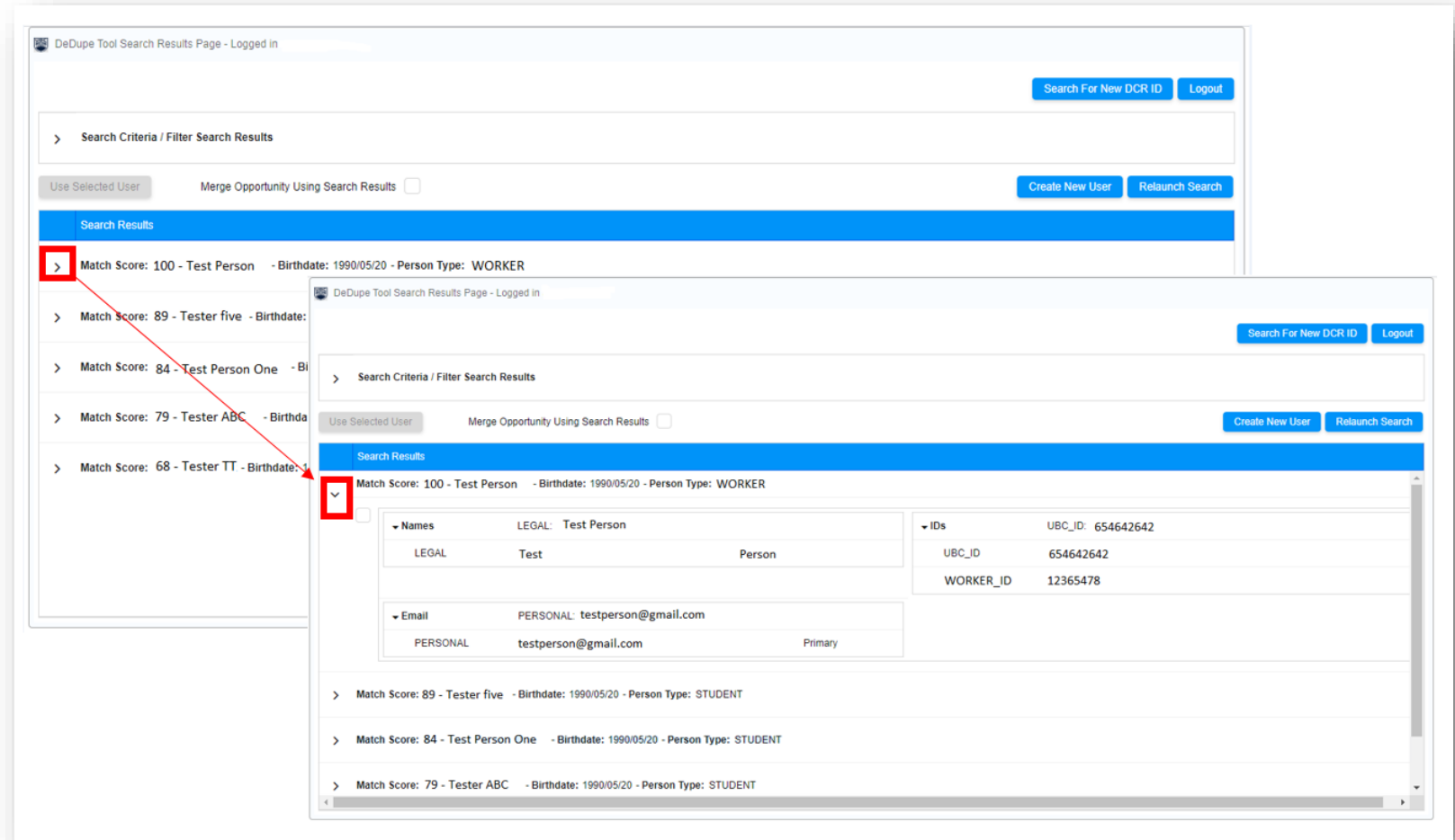
Example	Recommended Action
Name and email match but no SIN available match (57%)	SIN is a government issued identifier. In this case, the threshold is lower, but it could be a possible duplicate. Look at other data that may indicate it is a duplicate.
Legal Name, Date of Birth, email match (83%)	Verify additional data. It is a possible duplicate
Legal Name, SIN and Date of Birth match (71.4%)	It is a possible duplicate. Verify additional information, if available
Legal Name, Sin, email match (85%)	Possible match. Verify additional information

# DeDupe Tool

Drill down as required

Click the dropdown arrows on the left side of each row to view additional details of the search result.

Where additional information is available a further drill down will be displayed.



The screenshot displays the DeDupe Tool Search Results Page. The main interface shows a list of search results with columns for Match Score, Name, Birthdate, and Person Type. A red box highlights a dropdown arrow next to the first result (Match Score: 100 - Test Person - Birthdate: 1990/05/20 - Person Type: WORKER). A red arrow points from this dropdown to a detailed view of the same result, which is shown in a separate window.

The detailed view shows the following information:

- Match Score:** 100 - Test Person - Birthdate: 1990/05/20 - Person Type: WORKER
- Names:**
  - LEGAL: Test Person
  - LEGAL: Test Person
- Email:**
  - PERSONAL: testperson@gmail.com
  - PERSONAL: testperson@gmail.com (Primary)
- IDs:**
  - UBC\_ID: 654642642
  - UBC\_ID: 654642642
  - WORKER\_ID: 12365478

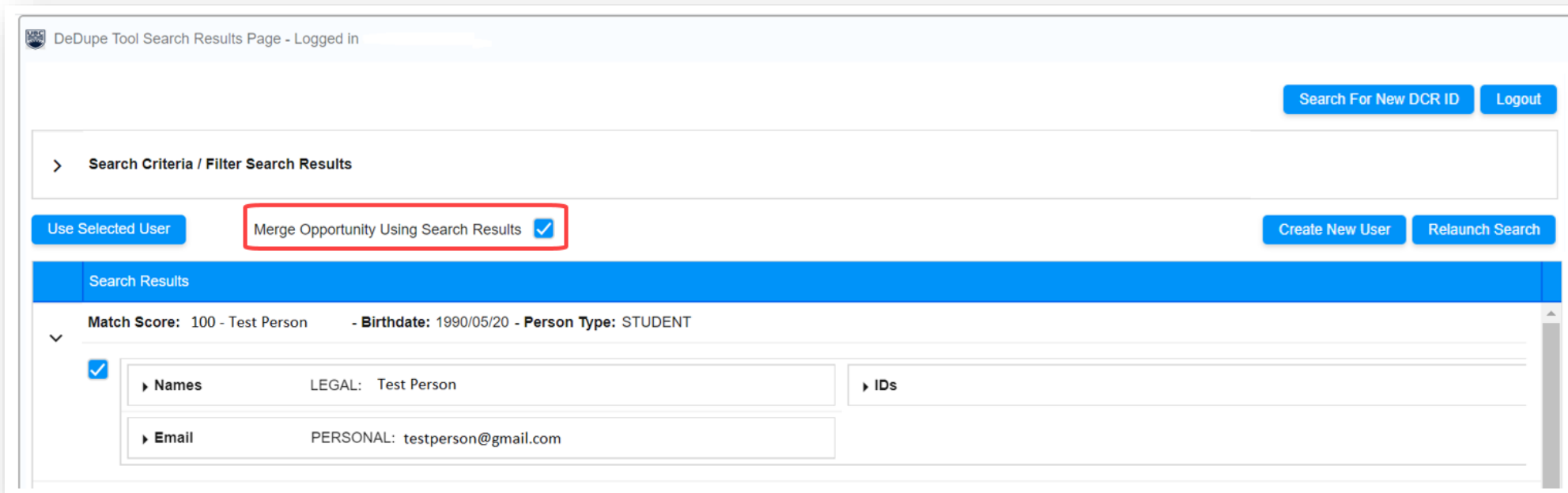
The detailed view also shows a list of other search results below the main details, including Match Score: 89 - Tester five - Birthdate: 1990/05/20 - Person Type: STUDENT, Match Score: 84 - Test Person One - Birthdate: 1990/05/20 - Person Type: STUDENT, and Match Score: 79 - Tester ABC - Birthdate: 1990/05/20 - Person Type: STUDENT.

# DeDupe Tool

## Merge opportunity and downstream implications

When DuDupe is presenting you multiple results, it is a very likely that they are the same person. In most cases, they are student employees where their SIN starts with a 9 and their email is a little different, but their date of birth might be accurate. However; in Workday, they may have presented a new SIN number and/or a different email address but the date of birth is the same which is very likely they're the same person. If the name is also a match, you can select the identities' as a great merge opportunity.

If you find a match on any of those unique identifiers SIN, date of birth, name, there is a high probability, you can select that attribute to merge which then creates an incident ticket number for the IAM team which they will review and consolidate if accurate.



The screenshot shows the 'DeDupe Tool Search Results Page - Logged in'. At the top right are buttons for 'Search For New DCR ID' and 'Logout'. Below this is a section for 'Search Criteria / Filter Search Results'. In this section, there are buttons for 'Use Selected User', 'Merge Opportunity Using Search Results' (which is highlighted with a red box and has a checked checkbox), 'Create New User', and 'Relaunch Search'. The main content area is titled 'Search Results' and displays a match for 'Test Person' with a score of 100, birthdate of 1990/05/20, and person type of STUDENT. A dropdown arrow is visible next to the match score. Below the match information, there is a table with two columns: 'Names' and 'IDs'. The 'Names' column shows 'LEGAL: Test Person' and 'PERSONAL: testperson@gmail.com'. The 'IDs' column is currently empty.

Names	IDs
LEGAL: Test Person	
PERSONAL: testperson@gmail.com	

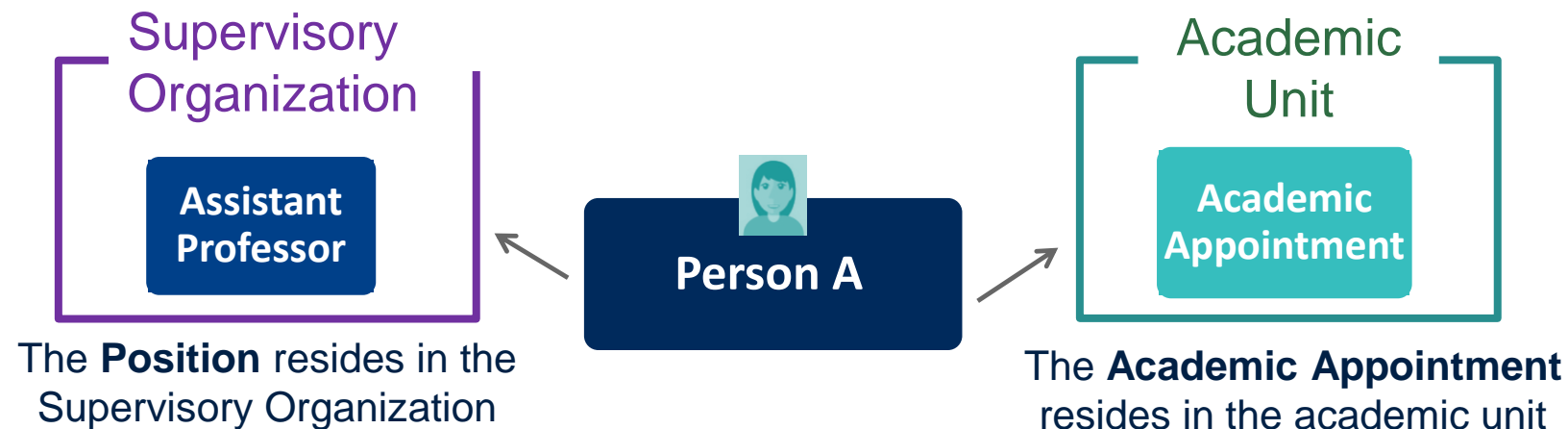
# Academic Appointments



# Academic Appointments

## Academic Appointments and Academic Units

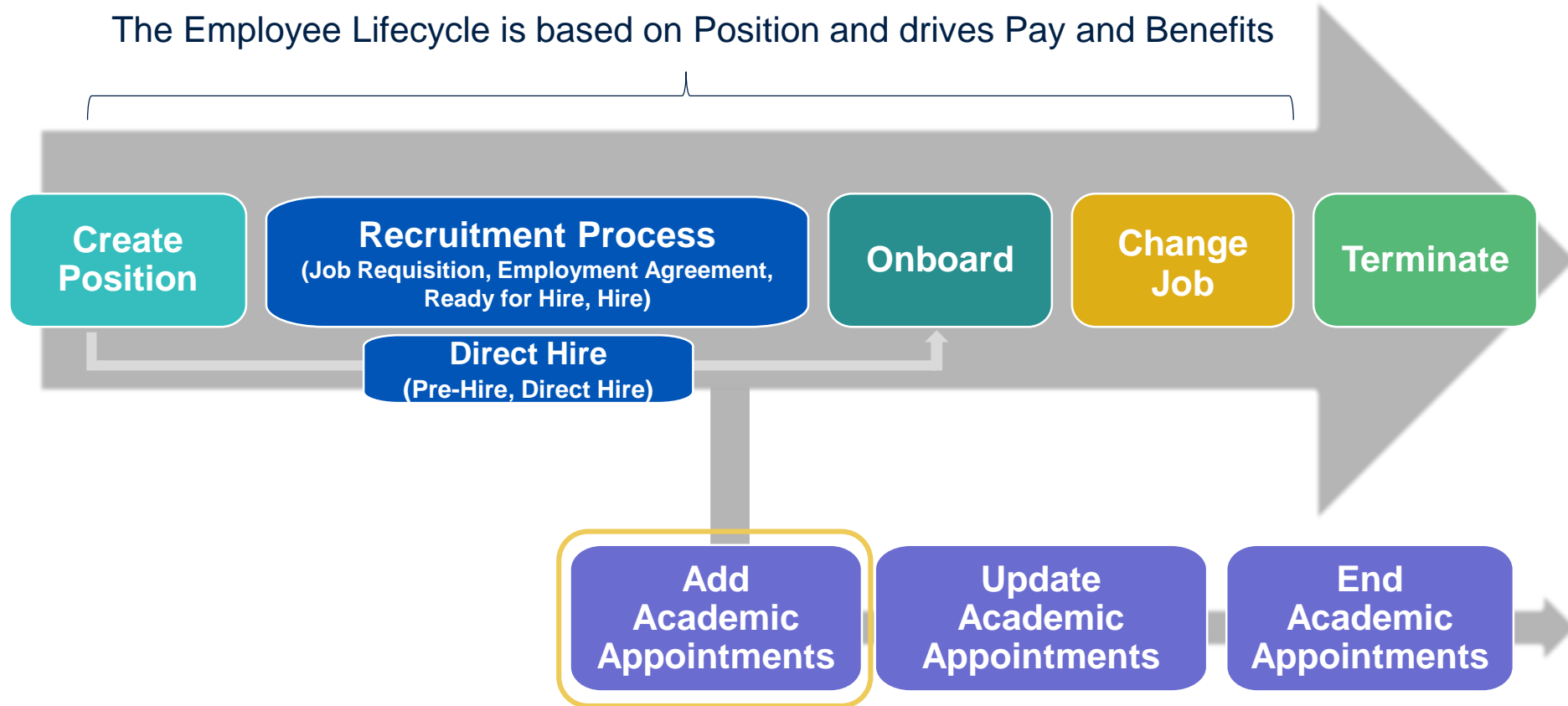
- Currently, the main purpose of **Academic Appointments** is to track the those who are involved in teaching or go through a formal promotion process; these groups include Clinicals, Librarians, and Tenure Stream.
- Academic Appointments are assigned within Academic Units. The Add/End/Update Academic Appointment is a sub process for all Hire/Add Job/Change Job/Termination/End Job Business Processes. Can also be done as a standalone task,
- In Workday, **Academic Units** are used to manage the delivery of education across the university.
- Academic appointments hold details such as tenure dates and rank as well as Joint Appointment information.
- Academic appointments do not impact pay or benefits. These components are on the JOB and distinct from positions.



# Academic Appointments

## The Employee Lifecycle - Faculty

The Employee Lifecycle is based on Position and drives Pay and Benefits



# Academic Appointments

## Joint Appointments

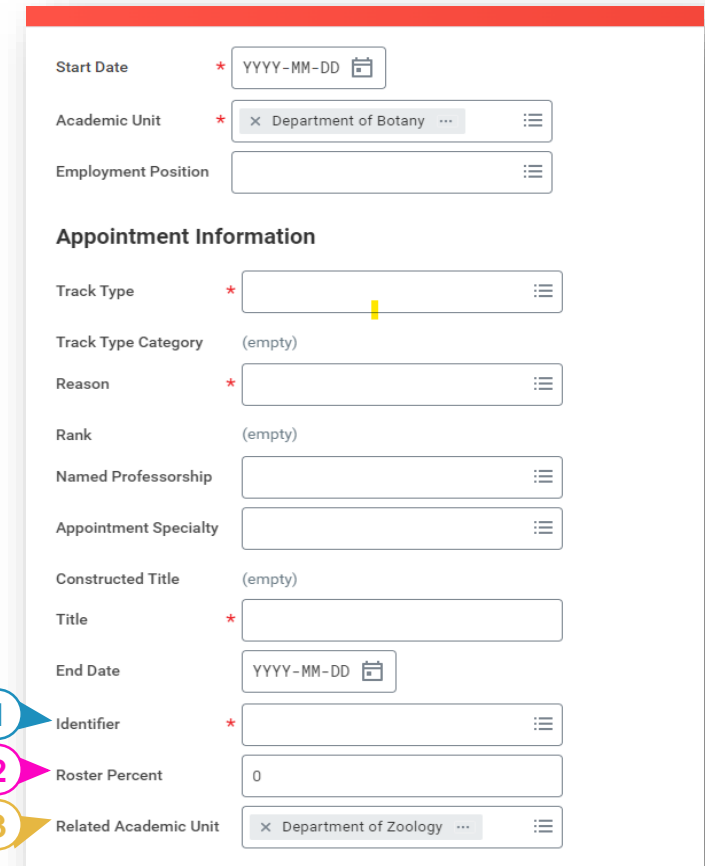
Another use for the Academic Appointment is to track **Joint Appointments**; this will allow all the applicable departments to have visibility on these formal arrangements.

The **JOB** is set up as a Matrix Organization. This means 1 job (in the home dept.), 2 (or more) Managers.

It is the Academic Appointment that reflects the Joint information, such as:

1. **Identifier** - Using the JOINT naming, for example Joint-Primary.
2. **Roster %** - This to record the % split between the Academic Units; this identifier is only used for formal Joint Appointments within the Faculty world.
3. **Related Academic Unit** – Corresponding Academic Unit involved in the Joint Appointment.

To set these up, you must first hire the tenure-stream faculty into the Home dept. and then request that the ISC set-up the Matrix Organization and the subsequent Academic Appointment(s).



The screenshot shows a web form for creating an Academic Appointment. The form includes the following fields:

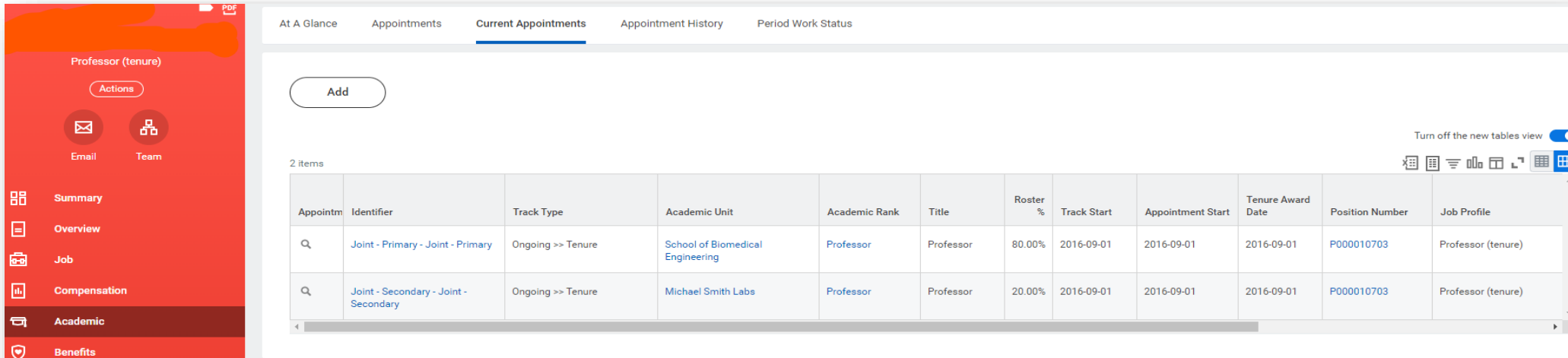
- Start Date**: A date picker field with a red asterisk.
- Academic Unit**: A dropdown menu showing "Department of Botany" with a red asterisk.
- Employment Position**: A text input field.
- Appointment Information**: A section header.
- Track Type**: A dropdown menu with a red asterisk.
- Track Type Category**: A text input field showing "(empty)".
- Reason**: A dropdown menu with a red asterisk.
- Rank**: A text input field showing "(empty)".
- Named Professorship**: A text input field.
- Appointment Specialty**: A text input field.
- Constructed Title**: A text input field showing "(empty)".
- Title**: A text input field with a red asterisk.
- End Date**: A date picker field.
- Identifier**: A text input field with a red asterisk. A blue callout bubble with the number "1" points to this field.
- Roster Percent**: A text input field showing "0". A pink callout bubble with the number "2" points to this field.
- Related Academic Unit**: A dropdown menu showing "Department of Zoology" with a red asterisk. A yellow callout bubble with the number "3" points to this field.



# Academic Appointments

## Things to Remember

- **Identifiers** – Primary used for Home dept., secondary, etc for each additional Academic Unit
- Must always have at least one **Primary or Joint – Primary** Academic Appointment Identifier; if need to change Identifier, please use the Update Academic Appointment standalone business process.
- **Formal Joint Appointments:** Joint – Primary for home dept, Joint-Secondary, etc. for each additional Academic Unit. The Joint identifiers are only to be used in these formal Joint Appts for tenure stream.
- One Academic Appointment per Academic Unit
- The Academic Appointment **does not** attract any benefits or salary; this information will be set on the Job.



Appointment Identifier	Track Type	Academic Unit	Academic Rank	Title	Roster %	Track Start	Appointment Start	Tenure Award Date	Position Number	Job Profile
Joint - Primary - Joint - Primary	Ongoing >> Tenure	School of Biomedical Engineering	Professor	Professor	80.00%	2016-09-01	2016-09-01	2016-09-01	P000010703	Professor (tenure)
Joint - Secondary - Joint - Secondary	Ongoing >> Tenure	Michael Smith Labs	Professor	Professor	20.00%	2016-09-01	2016-09-01	2016-09-01	P000010703	Professor (tenure)

# Faculty Funding



# Faculty Funding

Faculty can have one or more funding sources. Outside of the regular salary that is within the **Salary (REG)** section, there are other types of payments available to faculty. It is important to ensure you are aware of the various types, as these can directly affect benefits eligibility. You can have a combination of the Allowance Plans, but you are not able to have more than one of the same type of allowance plan at the same time.

## Main faculty allowance plans that are used:

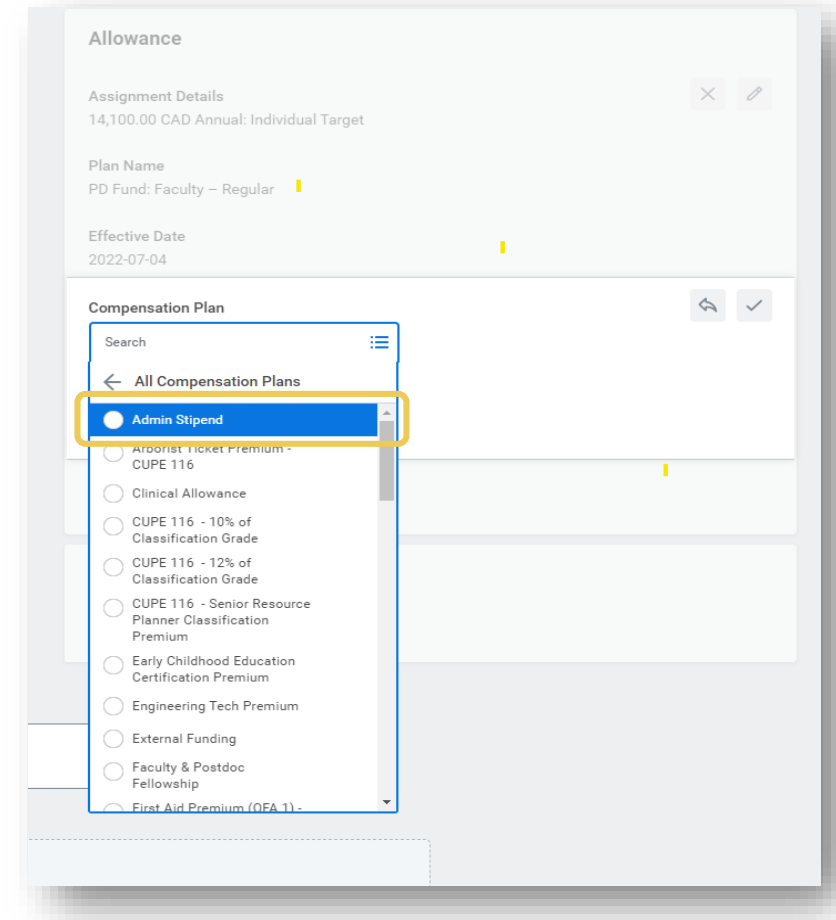
**Ongoing Honorarium (HON)** – Honoraria may be available to faculty members with salary for teaching overload, research, or for additional administrative duties. Must have an end date.

**External Funding (NUF)** – Paid directly by an outside source. Enter the allowance plan with what they are receiving monthly. This will ensure if eligible for benefits, correct processes are initiated. Doesn't trigger payroll.

**Clinical Allowance (CLI)** – Mainly used for tenure-stream faculty within Medicine.

**Admin Stipend (ADM)** – for Administrative roles such as Heads, Director of a School or Associate Deans. Stipends are taxable as salary, and attract pension and benefits, as well as CPP, EI, & WCB.

**Faculty & Postdoc Fellowship (PFL)** – All types of Fellowships in the employees name, being paid through UBC.



# Faculty Funding

## Things to Know

- ✓ **Payroll** - if you hire with the incorrect earnings, you cannot go back to the previous year - this is related to taxes;

**For example:** hired a PDF before the PFL has been received on Dec 1, 2021. Dept pays out of budget as regular salary. Award comes in March 1, 2022, dept wants to back date to Dec 1, 2021, to repay dept account. In this case, as per payroll, the earliest date you will be able to go back to is Jan 1, 2022.

- ✓ If the funding is being paid via only one or more of the Allowance Plans, you will need to 'x' out the Salary box to bypass any system errors.
- ✓ **In relation to PDF's** - Earnings from a supervisor's grant are salary, and as such as subject to the BC Employment Standards Act(ESA), as well as the Canada Revenue Agency. Fellowship earnings are not subject to the same deductions as regular (General Salary Plan) deductions, so it is very important to use the correct funding source.

# Student Fellowship Funding



# Student Fellowship Funding

## How fellowship funding works for students

Fellowship funding applies to certain types of payments that typically are not considered employment earnings and have different taxation and deductions

Unlike faculty and postdoc fellowships, which are added under Allowance Plans, student fellowship funding is determined by the Job Profile selected on the position and during the hire:

- Graduate Research Assistant = 100% fellowship earnings
- Undergraduate Research Assistant (Fellowship) = 100% fellowship earnings
- Undergraduate Research Assistant (Regular) = 100% regular earnings
- Graduate Teaching Assistant = 80% regular earnings & 20% fellowship earnings.

The salary amount entered in the General Salary Plan will be converted by Payroll to be coded as the correct earnings type for the job profile.



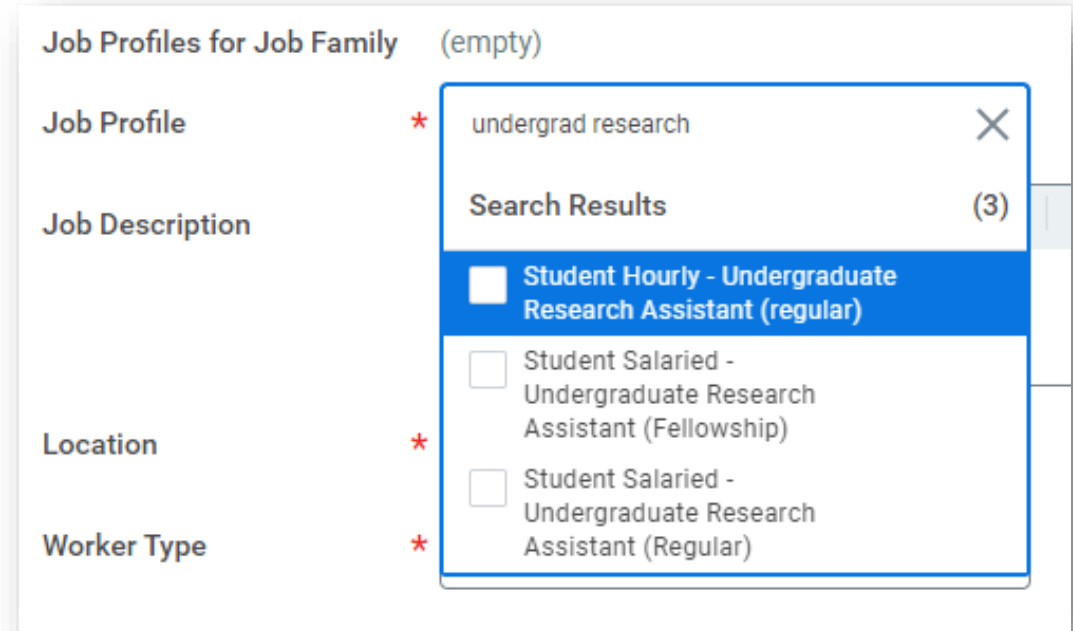
**Reminder:** Do not enter anything under the Allowance Plan

# Student Fellowship Funding

## Undergraduate Research Assistants (URAs)

Note that there are three different Undergraduate Research Assistant (URA) job profiles:

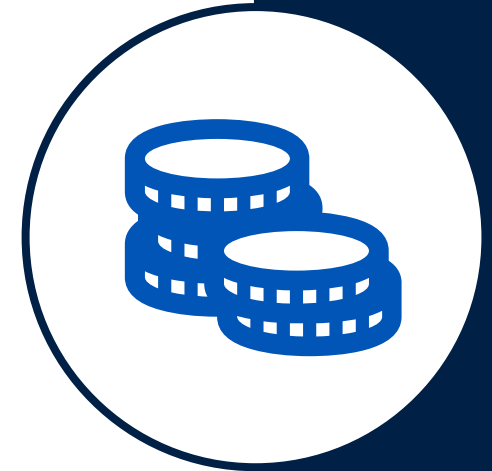
- 'Student Salaried - Undergraduate Research Assistant (Regular)' is appropriate for most URA appointments.
- 'Student Hourly - Undergraduate Research Assistant (Regular)' is for hourly paid regular URAs.
- 'Student Salaried - Undergraduate Research Assistant (Fellowship)' is for students paid by fellowship. This job profile will have no payroll deductions.
  - ✓ Departments are responsible for ensuring the fellowship is in line with Canada Revenue Agency guidelines.



Job Profiles for Job Family (empty)

Job Profile *	undergrad research X
Job Description	Search Results (3)
	<input checked="" type="checkbox"/> Student Hourly - Undergraduate Research Assistant (regular)
	<input type="checkbox"/> Student Salaried - Undergraduate Research Assistant (Fellowship)
	<input type="checkbox"/> Student Salaried - Undergraduate Research Assistant (Regular)
Location *	
Worker Type *	

# Updating Compensation

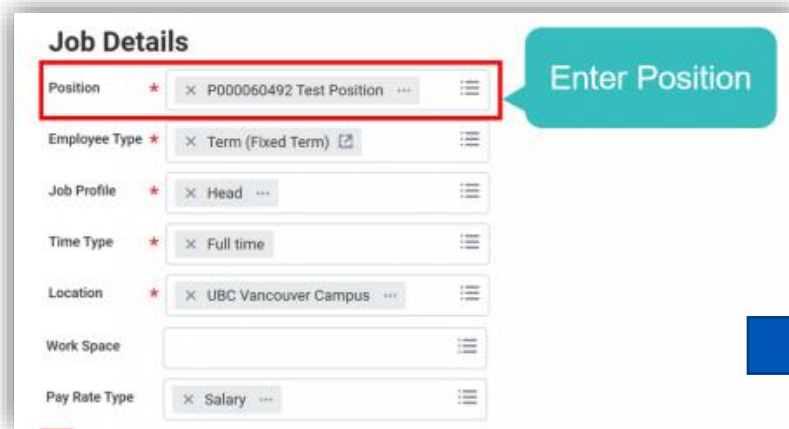




# Updating Compensation

## Defaulting from the Position

- The compensation details on the position automatically default into the Propose Compensation Hire step



**Job Details**

Position \* X P000060492 Test Position ...

Employee Type \* X Term (Fixed Term) ...

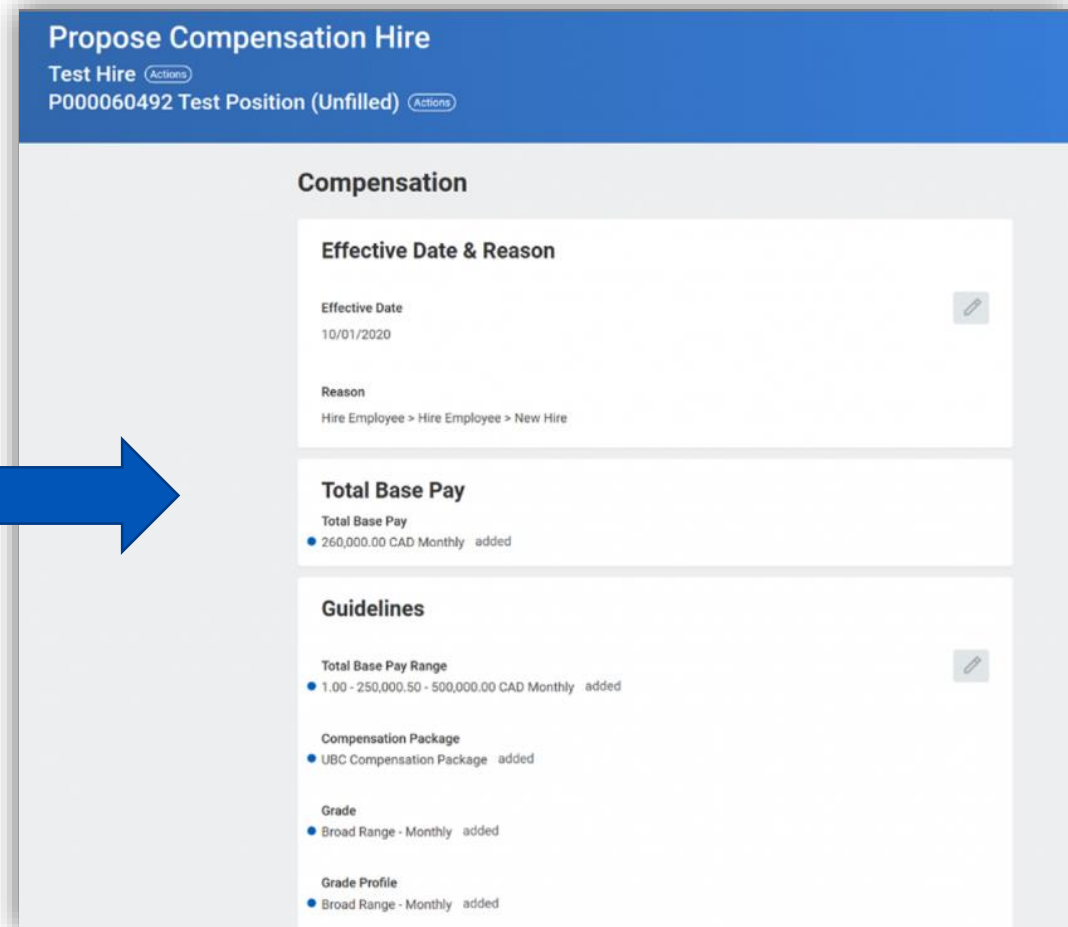
Job Profile \* X Head ...

Time Type \* X Full time ...

Location \* X UBC Vancouver Campus ...

Work Space ...

Pay Rate Type X Salary ...



**Propose Compensation Hire**

Test Hire (Actions)

P000060492 Test Position (Unfilled) (Actions)

**Compensation**

**Effective Date & Reason**

Effective Date  
10/01/2020

Reason  
Hire Employee > Hire Employee > New Hire

**Total Base Pay**

Total Base Pay  
• 260,000.00 CAD Monthly added

**Guidelines**

Total Base Pay Range  
• 1.00 - 250,000.50 - 500,000.00 CAD Monthly added

Compensation Package  
• UBC Compensation Package added

Grade  
• Broad Range - Monthly added

Grade Profile  
• Broad Range - Monthly added

# Updating Compensation

## Updating Position Compensation

- Default Compensation is set on a position when it is created.
- When there are changes to employee compensation, such as General Wage Increases, the details are updated on the employee's Compensation but not on the Position
- You can update the position too, but this is often not done until a later date, when the position is being reused
- Change Default Compensation, as a stand-alone process, is used to modify that amount once the position has been created. It is used for budgeting vacant positions and will be defaulted into the compensation process when filling the position.
- For Recruitment, the position compensation should be updated (if required) before posting, to ensure the correct pay rate is reflected in the posting
- For Direct Hire, the details are often done during the Direct Hire BP itself

# Updating Compensation

## Removing and Re-adding Pay Scales

- When the compensation on a position is out of date, on the Default Compensation on the Position you will likely see a discrepancy between the Total Base Pay and other details, such as the Total Base Pay Range and Step.
- This is an indication that you will likely need to remove (“x” out) and re-add these details during the Direct Hire

Position Overview
Hiring Restrictions
Qualifications
Default Compensation
Business Process History

Totals 1 item

Total Base Pay	Currency	Frequency
21.70	CAD	Hourly
	CAD	

**Compensation**

Compensation Package
UBC Compensation Package

Grade
CUPE 116 Schedule A - 37.5 Hours/Week - Hourly

Grade Profile
Grade 14a

Step
Step 01 - 22.14 CAD

Total Base Pay Range
22.14 - 22.67 - 23.20 CAD Hourly

Company
UBC The University of British Columbia

# Updating Compensation

## Removing and Re-adding Pay Scales

- On the Propose Compensation Hire step, the Total Base Pay and Hourly amounts reflect the details from the position.

**Propose Compensation Hire**

**Compensation**

**Effective Date & Reason**

Effective Date  
2022-08-09

Reason  
Hire Employee > Hire Employee > New Hire

**Total Base Pay**

Total Base Pay  
● 21.70 CAD Hourly added

**Hourly**

**Assignment Details**

● 21.70 CAD Hourly added

**Plan Name**

● Hourly Plan added

**Effective Date**

● 2022-08-09 added

Add

# Updating Compensation

## Removing and Re-adding Pay Scales

- However, under the Guidelines section, we can see that the amount for Step 1 is incorrect, due to a change in the pay scales that has happened since the position was originally created

### Guidelines

Total Base Pay Range

• 22.14 - 22.67 - 23.20 CAD Hourly added

Compensation Package

• UBC Compensation Package added

Grade

• CUPE 116 Schedule A - 37.5 Hours/Week - Hourly added

Grade Profile

• Grade 14a added

Step

• Step 01 - 22.14 CAD added

# Updating Compensation

## Removing and Re-adding Pay Scales

In this case, in order to update the compensation to the new pay rates for this Direct Hire, you will need to remove ("x" out) and then re-add it. This will update the details so you can proceed with the hire.

1. Click the 'x' to remove the step amount.

1

Click the "x" to remove the step amount

Compensation Package \*

× UBC Compensation Package ...

Grade \*

× CUPE 116 Schedule A - 37.5 Hours/Week - Hourly ...

Grade Profile

× Grade 14a ...

Step

× Step 01 - 22.14 CAD ...

2. Select the step to add it back in.

2

Select the step to add it back in

Compensation Package \*

× UBC Compensation Package ...

Grade \*

× CUPE 116 Schedule A - 37.5 Hours/Week - Hourly ...

Grade Profile

☒ Step 01 - 22.14 CAD ...

☐ Step 02 - 22.64 CAD

☐ Step 03 - 23.2 CAD

Search ...

3. Compensation details will now be updated.

3

Compensation details will now be updated

Total Base Pay

Total Base Pay

● 22.14 CAD Hourly added

Hourly

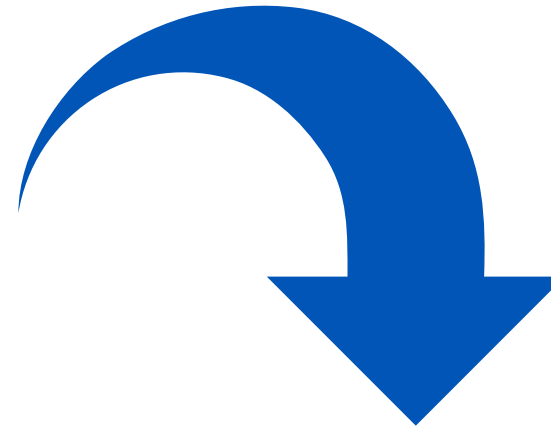
Assignment Details

● 22.14 CAD Hourly added

# Updating Compensation

## Compensation End Date Boomerang

- Boomerangs are automated processes that run behind the scenes to update information in Workday
  - Student termination is another boomerang you might be more familiar with
- A boomerang runs nightly to update the Compensation Expected and Actual End dates.
- When you enter the Term end date on the Hire, the Compensation end dates will automatically get updated overnight to match
- This ensures that term appointments are not overpaid if the Termination or End Additional Job is not fully processed and approved in a timely manner.





Use the **Q&A function** to ask questions and upvote your favourites.

The most upvoted questions will be addressed first.



# Retroactive Student Hires



# Retroactive Student Hires

## System function and limitations

- Workday works in a logical and chronological manner and is optimized for real time transactions
- There are restrictions and limitations on processing retroactive transactions especially after payroll has run for an employee
- University-wide it is understandable from time to time retroactive hires need to be addressed
- One limitation is that we cannot put in a hire prior to the employee's most recent start date



These limitations apply to all employment groups, not just student hires!

# Retroactive Student Hires

## Consequences and risks

When student hires aren't entered into Workday in a timely manner, there are both risks and downstream effects:

- **Data integrity** – artificial/inaccurate information in Workday presents a problem later when we look back on an employee's employment records e.g. inaccurate dates
- **Insurable earnings** – using alternative methods of payment e.g. an OTP means the employment income is not considered insurable earnings
- **Deductions** – alternative methods of payment do not allow for union dues to be deducted for unionized student employees. Additionally, the compensation for GRA and URA (Fellowship) roles are treated as stipends and aren't subject to deductions. Alternative methods of payment do not allow for earnings to be treated as fellowship earnings
- **Legal obligations** - missing employment agreements or inaccurate information in official employment agreements mean the University is not meeting its obligations

Please ensure your dept has a robust process in place to ensure hiring managers communicate with your dept administrator ahead of time their intentions to hire an employee *before* work is performed.

# Direct Hire Notifications to Employees



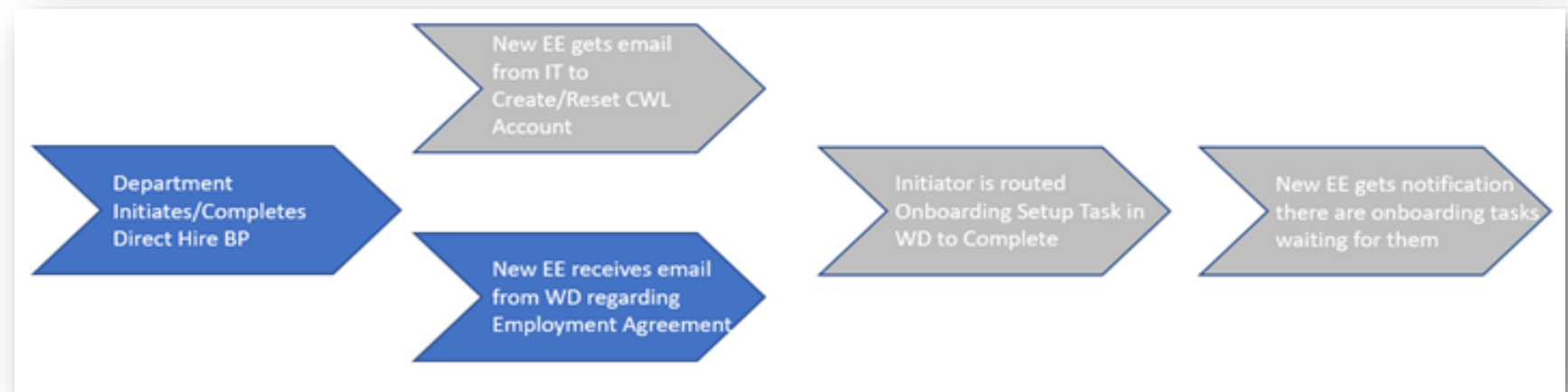
# Direct Hire Notifications to Employees

## Direct Hire Notifications and Tasks

During the Direct Hire process, there will be several Emails and Workday notifications sent to the successful candidate. **Please reference presentation appendix for visual examples.**

Depending on if the new employee is a rehire or not, they will receive the following emails and Workday notifications:

- Rehire who already have an Employee ID and CWL (Email sent through UBC IT)
- New Employee ID created as part of the hire (Email sent through UBC IT)
- Assigned FASmail confirmation email
- Awaiting acceptance of Employment Agreement in Workday
- Awaiting completion of Onboarding in Workday



# Appendix

# Direct Hire Notifications to Employees

Emails & Notifications: Sent if rehire who already has Employee ID and CWL

## Email #1 from IT – Reset CWL

Sent if rehire who already has Employee ID and CWL  
Sent through UBC IT (automatic process)

**Subject:** Welcome to UBC  
**From:** iam.no\_reply@ubc.ca  
**Notification Message:**

Hello (name):

Welcome to UBC.

You have been granted access to the following services:

- Enterprise Active Directory
- Enterprise LDAP
- Home Drive (Home Drive Storage Service)
- + Other services applicable to your role

Here are the details of your CWL account:

CWL Login Name is:

If you have received this email in error or have any questions, please contact UBC IT Help Desk.

Please do not reply to this message as it is sent from an unmonitored mailbox.

Regards,

Alistair Sutherland  
Manager, Identity and Access Management  
Information Technology | Engage. Envision. Enable.  
The University of British Columbia

# Direct Hire Notifications to Employees

Emails & Notifications: Sent if new Employee ID is created as part of the hire

## Email #1 from IT - Create New CWL

Sent if new Employee ID is created as part of the hire  
Sent through UBC IT (automatic process)

**Subject:** CWL Activation email

**From:** iam.no\_reply@ubc.ca

**Notification Message:**

iam.no\_reply@ubc.ca

Wed, 15 Sept 2021, 08:27



to me ▾

Dear [REDACTED]

You are receiving this email because you have an employment affiliation with the University of British Columbia and require a Campus Wide Login (CWL). Your CWL ID has been created, please click here &nbsp;  <https://activate.id.ubc.ca/iamweb/activation/setDateOfBirth.xhtml?vc=MTYzMTcxNzgzMzI2Mg@@RfiPOj1OBLLD1S0aAx0M> to activate it. You have 72 hours to activate your account using this link.

If you already have a Campus Wide Login (CWL), please do not complete the activation process. Please contact the IT Service Centre at IT Service Centre at: <http://it.ubc.ca/helpdesk> with the following information: existing CWL, new CWL listed in this email and your Employee ID.

Your CWL login name: [REDACTED]

Note: Your CWL Login Name is considered public information. See CWL Terms of Service for more information. <https://it.ubc.ca/services/accounts-passwords/campus-wide-login-cwl/terms-service> .

CWL gives you access to your UBC email and other UBC online services, such as free anti-virus software, UBC wireless, Faculty and Staff Self-Service Portal, and Virtual Private Network (VPN).

If you are having difficulties activating your CWL Account, then please contact the IT Service Centre at: <http://it.ubc.ca/helpdesk> . This message comes from an unmonitored mailbox. Please do not reply to this message.



# Direct Hire Notifications to Employees

## Emails & Notifications: FASmail

Email #2 from IT

**Subject:** Your new FASmail has been created  
**From:** iam.no\_reply@ubc.ca

**Notification Message:**

Dear (Name),

You are receiving this email because you have been assigned a **UBC Faculty & Staff Email (FASmail)** account, associated with Campus Wide Login (CWL): xxxxx

**Your FASmail address is** [xxx@mail.ubc.ca](mailto:xxx@mail.ubc.ca)

• **What is FASmail?**

FASmail is the business email account to use for official work at UBC.

• **Why should I use it?**

Using FASmail helps to secure confidential and personal information for both you and the University.

• **How will others at UBC know to contact me at this address?**

Your FASmail email address is listed as your business email address in HRMS and this address is used by UBC broadcast email, published in the Global Address Book of FASmail, and is available to all FASmail users for lookup.

Some users are also entitled to a department-specific email address for the duration of their appointment with that unit. Please contact your supervisor for more details.

• **Can I change the alias for this new address?**

Yes. To setup your @ubc.ca email alias, please visit <https://www.myaccount.ubc.ca/myAccount/>

• **Can I forward my FASmail address to another email account?**

Yes. Forwarding your FASmail to an approved business account can also be setup by visiting <https://www.myaccount.ubc.ca/myAccount/>. Please note: Automatically forwarding or redirecting UBC email accounts to outside service provider accounts is only acceptable for UBC faculty and staff members who have appointments at other institutions and have difficulty managing multiple work email accounts. For security and privacy reasons, forwarding a FASmail address to private email accounts, such as Gmail or Hotmail accounts, is prohibited. For a detailed description of this guideline please [click here](#).

**Need more information?**

- You can login to your account online at <https://www.mail.ubc.ca/> using your CWL. If unable to login, please go to <https://www.myaccount.ubc.ca/myAccount/> and reset your password in order to gain access to FASmail.
- If you are having difficulties with your FASmail account, please contact the IT Service Centre at <http://it.ubc.ca/helpdesk> or your local IT support team.

This message comes from an unmonitored mailbox. Please do not reply to this message.

# Direct Hire Notifications to Employees

## Emails & Notifications: Workday's Employment Agreement and Onboarding

### Email from Workday to Notify new hire/rehire of Employment Agreement awaiting action

Subject: Welcome to UBC!

Message:

Hello (Name)

To access Workday and accept your Employment Agreement, copy 'myworkday.ubc.ca' into your internet browser. You must have your CWL credentials to log in to Workday, and once you are in, your Employment Agreement and onboarding tasks will appear in your Workday inbox.

If you do not already have your CWL credentials, you will receive an email from UBCIT with your log in information within 48 hours.

UBC philosophy is to minimize clickable links in e-mails. Accordingly, most Workday communications that you receive will NOT have clickable links. Please bookmark the Workday login page in your browser to go directly there in future. Thank you for helping to keep UBC secure.

We look forward to you joining our team.

### Email from Workday notifying the new employee they have onboarding tasks to complete

Subject: Start your onboarding with UBC

Message

To access Workday and start your onboarding process, copy 'myworkday.ubc.ca' into your internet browser. You must have your CWL credentials to log in to Workday, and once you are in, your onboarding tasks will appear in your Workday inbox.

UBC philosophy is to minimize clickable links in e-mails. Accordingly, most Workday communications that you receive will NOT have clickable links. Please bookmark the Workday login page in your browser to go directly there in future. Thank you for helping to keep UBC secure.

# Workday Knowledge Base Articles

Visit the [Workday Knowledge Base](#) for more resources.



- [Direct Hire: Faculty & Staff](#)
- [Direct Hire: GRA & URA](#)
- [Direct Hire: Teaching Assistant \(TA\)](#)
- [DeDupe Tool](#)
- [Add Academic Appointment](#)

# Workday Training Courses

Search and run the [‘My UBC Workday Training’](#) report in Workday to see all courses available to you.

- Workday for Student Appointments



# Other Resources



- [Hiring a Student Employee](#) (UBCV HR)
- [Hiring Students](#) (UBCO)
- [Employee Handbook for Students](#)
- [First Days at UBC](#)
- [Faculty Relations](#)
- [HR Advisory Services](#)

# Next Workday Webinar



## October

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
17	18	19	<div>20</div> <div></div> <div>Understanding Absences and Time Off in Workday</div> <div>10 – 11:30am</div>	21

***Thank You!***