

# Human Resource Management System

## Workday Job Aid Manage Compensation



This Job Aid describes the functionality HR/Payroll professionals use to manage compensation related information for the County.

- Employees
- People Managers
- Human Resources

### Contents:

1. [Compensation Overview](#)
2. [Change Job](#)
3. [Comp/Ad-Hoc Comp Change](#)
4. [One Time Payments](#)
5. [Terminate Employee](#)
6. [Comp Reports and Dashboards](#)
7. [Propose Compensation Change](#)
8. [Make Offer Decision](#)
9. [Create Allowance Plan](#)
10. [Create Compensation Plan](#)
11. [Rollout Compensation Plans to Employees](#)
12. [Remove Compensation Plans from Employees](#)
13. [Set Up Compensation Grade](#)
14. [Set up Compensation Step Adjustment](#)
15. [Employee View of Compensation Details](#)



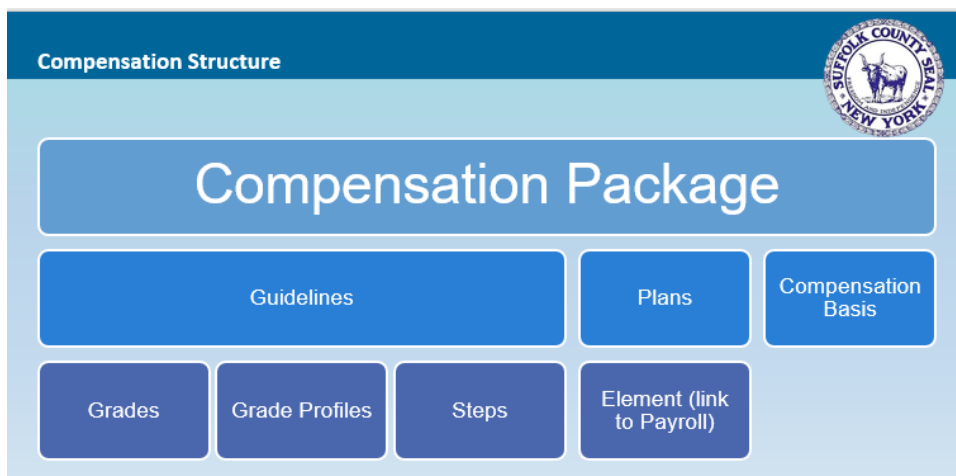
# Human Resource Management System

## Workday Job Aid Manage Compensation

### 1. Compensation Overview

The Compensation module within Workday is a key contributor and consumer of information with other Workday modules (e.g. HCM, Payroll, Benefits, Talent, Finance, etc.). It manages the rules used to determine what an employee's salary is comprised of. It is also used by Recruiting during the job offer process, and by Payroll to calculate what an employee is paid.

Compensation within Workday is a multi-level structure. Here is a diagram that showcases that structure and the hierarchy in which information rolls up:



# Human Resource Management System

## Workday Job Aid Manage Compensation



### 2. Change Jobs

When an employee changes their role within the County that change must be reflected in Workday. This information is updated by an HR Partner.

Here are the steps required to perform a job change in Workday:

- In the Workday Search bar enter the employee's name.
- Click on the employee in the results returned.
- Click on the **Actions** button, hover over **Job Change**, and then click on the **Transfer, Promote or Change Job** menu item.
- Make the necessary updates to the **Start Details** section. (Click on the pencil icon to enter edit mode).
- Then click the **Start** button at the bottom of the page. (This will take you to the Job section of this process.)
- Make the necessary updates to the different sections on the **Job** page. (Click on the pencil icon to enter edit mode for any section you wish to update).
- Then click the **Next** button at the bottom of the page. (This will take you to the Location section of this process.)
- Make the necessary updates to the **Location Details** section. (Click on the pencil icon to enter edit mode).
- Then click the **Next** button at the bottom of the page. (This will take you to the Details section of this process.)
- Make the necessary updates to the different sections on the **Details** page. (Click on the pencil icon to enter edit mode for any section you wish to update).
- Then click the **Next** button at the bottom of the page. (This will take you to the Attachments section of this process.)
- Upload any documents that support this job change.
- Then click the **Next** button at the bottom of the page. (This will take you to the Organizations section of this process.)



# Human Resource Management System

## Workday Job Aid Manage Compensation



- Make the necessary updates to the different sections on the **Organizations** page. (Click on the pencil icon to enter edit mode for any section you wish to update).
- Then click the **Next** button at the bottom of the page. (This will take you to the Compensation section of this process.)
- Make the necessary updates to the different sections on the **Compensation** page. (Click on the pencil icon to enter edit mode for any section you wish to update).
- Then click the **Next** button at the bottom of the page. (This will take you to the Summary page of this process.)
- Review all information displayed to confirm accuracy and completeness.
- Click **Submit**.
- Click **Done**.

**Note:** This will require several levels of approval before being processed. The employee's manager and their manager's manager will be the first to review and approve this job change. After that, it will be sent to the HR partner who will assign the correct Collective Agreement. At this point, the Job Change has been processed successfully.



# Human Resource Management System

## Workday Job Aid Manage Compensation



### 3. Comp/Ad-Hoc Comp Change

A manager can request a compensation change for one of the members of their team using the **Request Compensation Change** task.

Here are the steps required to request a compensation change for an employee in Workday:

- In the Workday Search bar enter the employee's name.
- Click on the employee in the results returned.
- Click on the **Actions** button, hover over **Compensation**, and then click on the **Request Compensation Change** menu item.
- Enter the **Effective Date** of the change if it is different from the current value.
- Click **OK** (This will take you to the Compensation section of this process.)
- Make the necessary updates to the different sections on the **Compensation** page. (Click on the pencil icon to enter edit mode for any section you wish to update).

**Note:** Must fill in a **Reason** for the change as well as update the **Salary** section.

- Click **Submit**.
- Click **Done**.

**Note:** This request is sent to the **Compensation Partner** for review, and then to the employee's manager for approval. The final approval is made by the HR Executive.



# Human Resource Management System

## Workday Job Aid Manage Compensation



### 4. One Time Payments

A manager can request a member of their team be issued a one-time payment through the Workday system.

- Here are the steps required to request a one-time payment for an employee in Workday:
- In the Workday Search bar enter the employee's name.
- Click on the employee in the results returned.
- Click on the **Actions** button, hover over **Compensation**, and then click on the **Request One-Time Payment** menu item.
- Enter the **Effective Date** of the request.
- Click **OK** (This will take you to the One-Time Payment Summary section of this process.)
- Make the necessary updates to the different sections on the **One-Time Payment Summary** page. (Click on the pencil icon to enter edit mode for any section you wish to update).
- Click **Submit**.
- Click **Done**.

**Note:** This request is sent to the **Audit and Control** for approval.



# Human Resource Management System

## Workday Job Aid Manage Compensation



### 5. Terminate Employee

The steps involved to terminate an employee are documented in the **Managing Employees** job aid ([SC-CM-TRN-011 Job Aid – Managing Employees](#)). Please review that document for further details.



# Human Resource Management System

## Workday Job Aid Manage Compensation



### 6. Comp Reports and Dashboards

Several reports provide compensation-related information. All reports are accessible from the **Compensation** application located on the Workday homepage.

Here is a brief overview of the Compensation Reports available:

- **Compensation Plans** – This report provides details on each compensation plan defined in Workday for the County.
- **Compensation Eligibility Rules** – This report will define the rule used to identify the population of employees who are eligible for the plan. It also identifies the Compensation Components associated **with the rule**.
- **Calculation Exception Audit** – This report will identify any calculations that are erroring out. It is expected that the count in the exception column be zero. When it is not, there is a problem.
- **Calculated Plan Calculation Category Audit** – This report helps to make sure that the calculations are based on employee compensation. We need to test to make sure that the reference compensation isn't pulling from actuals and the category helps - the compensation calculations should be pulled from calculation categories.
- **Condition Rule Exception Audit** – This report identifies issues with compensation condition rules and provides details regarding those issues so that they can be corrected.
- **Compensation Setup Data Audit** - This report lists all Compensation Setup items that have exceptions. Setup items are grouped by type with any problems they have.  
**Note:** If this report is empty then your setup data is clean.
- **Employee Compensation Audit** – This report identifies at the employee level the compensation plan(s) an employee is correctly assigned (1). It also shows which plan(s) the employee is assigned that they are NOT eligible for (2). Finally, it shows the plan(s) that the employee is eligible for that they are not assigned (3). The goal of the report is to have column 1 filled in and columns 2 and 3 empty.
- **Audit Compensation Grade** - This report provides the number of segments for the compensation grades. and the base pay element. The county doesn't use pay segments but the intended use is for helping determine where an employee falls within "wage penetration". For Base Pay Elements - this corresponds back to payroll and calculations we need to ensure that the base pay element has an earning code.





# Human Resource Management System

## Workday Job Aid Manage Compensation



### 7. Propose Compensation Change

Propose Compensation is a subprocess that is part of the Hire, Change Job, and Add Job business processes. For this lesson, we will show how to propose a compensation change using the Change Job business process.

Here are the steps required to request a one-time payment for an employee in Workday:

- In the Workday Search bar enter the employee's name.
- Click on the employee in the results returned.
- Click on the **Actions** button, hover over **Job Change**, and then click on the **Transfer, Promote or Change Job** menu item.
- Click on the pencil icon and select a reason for making the change.
- Save the changes and click the **Start** button.
- Click on the Compensation link listed on the left side of the page and then edit the Guidelines section.
- Make the appropriate updates to reflect the proposed compensation and click the Save checkmark. (e.g. Grade, Grade Profile, Step, and Progression Start Date).
- Click **Next**.
- Click **Submit**.

**Note:** This change requires several approvals before processing. The first approval is by the employee's manager if they were not the person to submit the proposal. The next approval is the manager's manager. The final approval for this process is by the HR Partner.



# Human Resource Management System

## Workday Job Aid Manage Compensation



### 8. Make Offer Decision

As part of the hiring process, a candidate will be issued an offer after completing several steps. One component of this process involves the compensation that the candidate is being offered. It should be noted that when the position was created the compensation partner reviewed and approved the compensation for the position. Because of that upfront step, the Compensation Partner is not involved in the Hire process if the original offer is accepted by the candidate.

Only if the compensation is adjusted as part of negotiation efforts with the candidate will the Compensation Partner get involved in the hiring process. When the compensation information is updated it is sent on to the Compensation Partner for review and approval. The compensation partner can send it back to the HR partner requesting additional information, or they can approve the changes. Once the Compensation Partner ultimately approves the updated compensation the system generates a new offer and sends it on to the candidate.

When the candidate accepts the new offer it is sent to the hiring manager who reviews the entire offer and performs the final approval.

As you can see the upfront work performed when creating a position eliminates the need for a compensation partner to get intimately involved with each hire taking place at the County.



# Human Resource Management System

## Workday Job Aid Manage Compensation



### 9. Create Allowance Plan

To provide employees with compensation for specific items an Allowance plan is created and assigned to the employee's Compensation.

Here are the steps required to Create an Allowance Plan in Workday:

- In the Workday Search bar enter "cre all".
- Click on the task **Create Allowance plan** in the results returned.
- Enter the **Effective Date** of the Allowance Plan.
- Select the type of the **Allowance Plan** (Amount, Percent, or Unit Based Plan).
- Click **OK**.
- Enter the appropriate information in the **Details** and **Allowance Defaults** sections of the page.

**Note:** When creating an Allowance Plan it is recommended to create a **Compensation Element** that corresponds to the plan.

- Here are the steps to create a **Compensation Element**.
  - a. In a separate instance of Workday enter "**mai com ele**" in the search bar.

**Note:** To create a new instance of Workday right click on the browser tab that Workday is running in and click the Duplicate option. This will create a new browser tab with you already logged into Workday.
  - b. Click on the **Maintain Compensation Elements** item in the search results.
  - c. Fill in the appropriate fields (\* indicates a required field).

**Note:** It is best practice to name the compensation element similar to that of the corresponding allowance plan.
  - d. Click **OK**.
  - e. Click **Done**.



# Human Resource Management System

## Workday Job Aid Manage Compensation



**Note:** Each Compensation Element should have its own Earning Code. The earning code is what ties it to Payroll. A Payroll partner is responsible for adding the Earning Codes.

- Here are the steps to create an Earning Code.
  - a. Enter “**cre ear**” in the Workday search bar.
  - b. Click on the **Maintain Compensation Elements** item in the search results.
  - c. Fill in the appropriate fields (\* indicates a required field).

**Note:** For the Compensation Element field; make it a point to select the associated **Compensation Element** added previously.

- At this time you will need to navigate back to the browser tab that has the **Create Allowance Plan** task.
- Select the **Compensation Element** under the **Allowance Defaults** section, as well as all other appropriate information.

**Note:** The information entered in the **Allowance Defaults** section defines the parameters that will apply to the majority of employees involved (based on the **Plan Eligibility Rules** selected).

- Navigate to the Plan Eligibility section and select the Eligibility Rule(s) that define the employee population to receive this allowance plan.

**Note:** if there is a population that is to receive this allowance plan, but with other amounts than those set as the Allowance Defaults, Allowance Plan Profiles can be defined to create exception rules.

- To add an **Allowance Plan Profile** click the plus sign in the grid.
- Fill in the appropriate fields (\* indicates a required field).



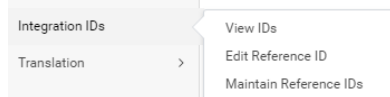
# Human Resource Management System

## Workday Job Aid Manage Compensation



**Note:** Before completing the **Create Allowance Plan** task, we need to modify the **Reference ID** associated with this plan. This ID is used in any integrations set up with systems that interface with Workday.

- At the top of the page click on the **Actions** button next to the Allowance Plan name.
- Hover over **Integration IDs** and then click on the **Edit Reference ID** menu item.



- Update the **Reference ID Value** field with a value that is similar to the Allowance Plan name.

**Note:** The only difference between the Allowance Plan Name and the Reference ID is that any spaces in the name are to be replaced with an “\_”. For example, an Allowance Plan named “ABC Allowance Plan” will have an Integration ID of “ABC\_Allowance\_Plan”.

- Click **OK**.
- Click **Done**.

Now that the Allowance plan has been created it needs to be added to the County’s Compensation Package so that it can be given to employees.

Here are the steps required to add an Allowance plan to a Compensation Package:

- In the Workday Search bar enter “edi com pac”.
- Click on the task **Edit Compensation Package** in the results returned.
- Enter the **Effective Date** of the change.
- Select the **Compensation Package**.

**Note:** The County only has one Compensation Package defined at this time. (**Suffolk County Compensation Package**).

- Click **OK**.
- Scroll to the bottom of the page and click on the **Compensation Plans** tab.
- Click on the plus sign at the top-left of the grid to add a new line.
- Select the plan you are looking to add in the **Compensation Plan** column.
- Click **OK**.
- Click **Done**.



# Human Resource Management System

## Workday Job Aid Manage Compensation



### 10. Create Compensation Plan

In Workday, the term Compensation Plan represents several finance-related plans. They include:

- Salary Plan
- Hourly Plan
- Period Salary Plan
- Allowance Plan
- Unit Allowance Plan
- Merit Plan
- Bonus Plan
- Commission Plan
- Future Payment Plan
- One-Time Payment Plan
- Calculated Plan

Although they serve different purposes, the process to create them is very similar. The previous lesson should be followed as a guide to creating any of the other Compensation Plans.



# Human Resource Management System

## Workday Job Aid Manage Compensation



### 11. Rollout Compensation Plans to Employees

This task is used to assign new compensation plans to employees. As of the Effective Date specified, the employees identified in the Eligibility Rule will receive the compensation.

Here are the steps required to Rollout a Compensation Plan to Employees:

- In the Workday Search bar enter "rol comp plan".
- Click on the task **Rollout Compensation Plans to Employees** in the results returned.
- Enter the **Process Name**. (The name should tie to the compensation plan name.)
- Enter the **Effective Date** of this transaction.
- Select the **Reason** for the Compensation Plan
- Select the **Compensation Plan(s)** to be rolled out.
- If this plan is to be rolled out to a subset of the County Employees, that information should be entered in the **Select Employees** section.
- Click **OK**.
- Click **Done**.



# Human Resource Management System

## Workday Job Aid Manage Compensation



### 12. Remove Compensation Plans from Employees

There are times when a compensation plan is no longer applicable. That case could be for all employees or a specific subset. In either case, the **Remove Compensation Plans from Employees** task is used.

Here are the steps required to Remove Compensation Plans from Employees:

- In the Workday Search bar enter "rem comp".
- Click on the task **Remove Compensation Plans from Employees** in the results returned.
- Enter the **Process Name**. (The name should tie to the compensation plan name.)
- Enter the **Effective Date** of this transaction.
- Select the **Reason** for the removal of the Compensation Plan
- Select the **Compensation Plan(s)** to be removed.
- If this plan is to be removed from a subset of the County Employees, that information should be entered in the **Select Employees** section.
- Click **OK**.
- Click **Done**.





# Human Resource Management System

## Workday Job Aid Manage Compensation



### 13. Set Up Compensation Grade

For many jobs, the amount of relevant experience a person has will determine what their compensation will be. A **Compensation Grade** in Workday allows for different levels of experience or steps to be defined for a given job. Each of those steps has a different salary value assigned to it. This enables the system to determine what base salary to pay an individual based on the step they are assigned.

Here are the steps required to complete the **Set up Compensation Grade** task:

- In the Workday Search bar enter "cre comp gra".
- Click on the task **Create Compensation Grade** in the results returned.
- Populate the fields appropriately. (\* indicates a required field).
  - a. Enter the **Effective Date** of this transaction.

**Note:** Enter 01/01/1900 to make it effective from the beginning of time, or enter the specific date this grade is to be effective.
  - b. Adjust the Pay range Segments if they differ from the value displayed (4).
- Click **OK**.
- Fill in the **Detail** and **Default** sections of the next page (\* indicates a required field).

**Note: Base Pay Elements** should be set to **Standard Base Pay**.

- Click **OK**.
- Click **Done**.
- Go back to the Workday Search bar and enter "com gra".
- Click on the **Compensation Grade** report in the results returned.
- Enter the Effective Date from above in the **View As Of Date** field.
- Select the name of the **Compensation Grade** that was created above.
- Click **OK**.
- Click on the **Action** button, hover over **Compensation Steps**, and then click on **Maintain**.
- Fill in the Effective Date (Same as above).
- Click **OK**.



# Human Resource Management System

## Workday Job Aid Manage Compensation



- On the next page check the box labeled **Assign First Step During Compensation Proposal**.

**Note:** Checking this box is considered a Best Practice. When Default Compensation is assigned to a position, step 01's salary amount is populated automatically.

- Select the Appropriate **Salary Pay Plan** (Salary or Hourly).
- Scroll to the bottom of the page and click the plus sign on the **Steps** grid. Click once for each step that this salary grade has.
- Enter a two-digit Sequence number for each row created (e.g. 01,02,03,...).
- Enter the **Name** of each step and include the Salary Grade name and the Step number as part of the name. (e.g. AME Grade 46 – Step 01, AME Grade 46 – Step 01, etc.).
- Enter the **Amount** for each step.
- Select the **Period** value for each step.
- Enter the **Interval** value that corresponds to the **Period** selected for each step.
- Click **OK**.
- Click **Done**.

**Note:** A **Compensation Grade** needs to be put in a Compensation Package so that it can be applied to a Job Profile.

- To Add a Compensation Grade to a Compensation Package enter "com pac" in the Search Bar.
- Select the **Compensation Package report** returned in the result set.
- Leave the View As Of date set to today's date.
- Select the Compensation Package from the list provided.

**Note:** Currently, there is only one Compensation Package defined – **Suffolk County Compensation Package**.

- Click **OK**.
- Click on the **Actions** button, hover over **Compensation Package**, and then click on the **Edit** menu item.
- Enter Today's Date in the **Effective Date** field.
- Click **OK**.
- Scroll toward the bottom of the page and click on the plus sign on the Compensation Grades grid.



# Human Resource Management System

## Workday Job Aid Manage Compensation



- Select the Compensation Grade and search for the name of the Compensation Grade you wish to add.
- Click **OK**.
- Click **Done**.

**Note:** At this point, it is important to tie a compensation grade to a **Job Profile**.

- In the Workday Search bar enter "job pro".
- Click on the report **Job Profile** from the results returned.
- Click **OK**.
- Click on the **Compensation** tab.
- Click on the **Actions** button, hover over **Job Profile**, and then click on the **Edit** menu item.
- Click **OK**.
- Scroll down to the **Compensation** section and focus on the **Compensation Grade** field.
- Remove any existing item in the field (Click "x").
- Search for the **Compensation Grade** name just added and select it.
- Click **OK**.
- Click **Done**.



# Human Resource Management System

## Workday Job Aid Manage Compensation



### 14. Set Up Compensation Step Adjustment

For those compensation grades that have grade profile steps defined for them, the following task is used to update the compensation amount for each step.

Here are the steps required to complete the **Set up Compensation Step Adjustment** task:

- In the Workday Search bar enter "comp ste adj".
- Click on the task **Set Up Compensation Step Adjustment** in the results returned.
- Enter the **Effective Date** of this transaction.
- Select the **Compensation Grade** to be updated.
- Click **OK**.
- Enter the **Event Name** for this transaction.
- Select the **Reason** for the adjustment.
- In the **Employees using Default** section make the appropriate selection.

**Note:** This pertains to those employees who are using the default salary step amounts.

- In the **Employees using Override** section make the appropriate selection.

**Note:** This pertains to those employees whose salary is between step amounts.

- Click on the **Grade Profile Steps** tab of the grid at the bottom of the page.
- Enter the new amounts for each step listed in the **New Amount** column.

**Note:** This will cause the salaries to be adjusted to the new value based on the step.

- Click **Submit**.
- Click **Done**.



# Human Resource Management System

## Workday Job Aid Manage Compensation



### 15. Employee View of Compensation Details

To provide access to and to improve an employee's overall understanding of the compensation they are assigned here at the County a new feature has been added to the Employee Profile page. In this feature, the employee will be able to view and learn about the details that make up their complete Compensation. Some of the items displayed include Compensation Grade, Grade Profile, and Step to name a few.

The following are instructions to access an Employee's Compensation information in Workday.

- After logging into Workday, the employee will click on the icon that is to the far right of the search bar.  
**Note:** This icon looks like a head and shoulders silhouette or the employee's face if they had uploaded their photo into Workday.
- On the menu that appears, click on the View Profile button.
- Note: The employee's Workday Profile page will be displayed. Special attention should be paid to the blue section on the left-hand side of the page.
- Click on the **Compensation** tab displayed in the blue section of the page.
- **Note:** The right side of the page will now display the details regarding the employee's compensation.
- At the top of the page, listed items include Total Salary & Allowances, Total Base Pay, as well as the Pay Frequency.
- Moving down the page is the section labeled **Compensation**.
- **Note:** Here the employee will view their assigned Grade, Grade Profile, and current Step for that Grade.
- The last section of the page is labeled **Plan Assignments**.
- **Plan Assignments** consist of all the individual **Compensation Plans** assigned, the **Effective Date(s)**, **Plan Type(s)**, and under **Assignment**, the monetary value each represents.



# Human Resource Management System

## Workday Job Aid Manage Compensation

Now that you have seen the information, here is a brief explanation of what each item listed represents.

### Compensation

Compensation Package Suffolk County Compensation Package

Grade AME - Grade 09

Grade Profile Grade 9 - 15 Step Program - After 2019

Step Grade 9 - 15 Step Program - Step 02 - 1321 USD

Total Base Pay Range 1,214.00 - 1,935.00 USD Biweekly 26.1

Company County of Suffolk

The Compensation Package is the grouping of all the compensation plans which the County currently utilizes. When a new plan is created, it will be added to the compensation package.

The Grade is the pay level associated with the Job Profile.

The Grade Profile is the Collective Agreement Chart associated with the Worker. This is typically based on hire date.

The Step is the assignment of incremental increases associated with the Grade.

The Total Base Pay Range is the salary range for the Grade.

The Company is used to denote our organization and is used in eligibility rules.

### Plan Assignments 4 items

Effective Date	Plan Type	Compensation Plan	Assignment
02/01/2023	Salary	Salary Plan	1,321.00 USD Biweekly 26.1
04/03/2023	Dynamic Calculated	K-9 AME PLAN	145.31 USD Biweekly 26.1 Calculated on 04/27/2023
04/03/2023	Allowance	Cleaning Allowance Nontaxed	250.00 USD Annual
04/03/2023	Allowance	Shift Pay NonTemp Titles	10% Biweekly 26.1

The Effective Date is the date the compensation plan was assigned to be included in pay.

The Plan Type is the type of compensation plan. Different types of plans are created to pay workers in various ways. For example, a dynamically calculated plan uses set calculations with variable components.

The Compensation Plan is the name of the plan assigned to the worker.

The Assignment is the amount of the plan included in pay. Some plans are calculated at a biweekly rate, while others will only show the rate as seen in the Shift Pay example.



# Human Resource Management System

## Workday Job Aid Manage Compensation



### Change Log

Revision Number	Date of Change	Affected Lesson	Action	Initials
1.1.1.1	09/15/2021		Log Created	RK
1.1.1.2	05/11/23	Employee View of Compensation Details	Lesson Created	RK