

IN THE KNOW

UBCO's newsletter for the latest updates on Workday HR and Finance



WORKDAY TIP OF THE MONTH

Ledger Summary - Distributed Report Filters



Ledger Summary - Distributed

Instructions This report only allows to run by Fiscal Year (en... issues with the Carry Forward and Ending Balan... Summary - Distributed

Organization *

Period * x FY2022 - Mar

Worktags

Filter Name

Manage Filter

0 Saved Filter

OK

- Search
- Company Hierarchy
- Contingent Worker
- Corporate Credit Card Account
- Cost Center
- Cost Center Hierarchy
- Customer
- Customer Category
- Customer Contract
- Customer Group
- Debt
- Discounts
- Employee

When running the **Ledger Summary - Distributed** report, take note of the **Worktags** filter prompt. You can filter your search to a specific employee, supplier, expense item, spend category, and much more. If you are looking for a specific transaction within the ledger summary, this filter is a helpful way to produce granular results without populating the entire report.

MARCH ENGAGEMENTS



Workday Wednesday: HR and Finance Q+A

Wednesday, March 9th | 10:00 – 11:00am

[Register here](#)

Please share session details with your teams!

We will begin cancelling sessions with low registration numbers.

All previous session recordings and slides [can be found here](#).



FEATURE KNOWLEDGE BASE ARTICLE

FAQ: Entering or Correcting Time

[Find article here](#)

2021 T4/T4A/T2200S FORMS AVAILABLE IN WORKDAY

All UBC employees are now able to access their 2021 tax forms in Workday. To access your tax documents, navigate to your 'Pay' application in Workday and click 'My Tax Documents'.

MARCH 2022 WORKDAY RELEASE

Workday has releases twice per year in September and March. These releases include Workday system updates with both mandatory and optional items UBC can choose to adopt. The next Workday release, scheduled for Saturday, March 12th, will include changes to the homepage, search functionality, and navigation. More information can be found on the [Workday Releases webpage](#).

YEAR END DEADLINES AND PROCEDURES

UBC operates on a financial calendar that runs from April 1 to March 31. Adherence to the year-end cut-off dates is critical to provide adequate time for the preparation of year-end financial statements. Please consult the [presentation](#) and [recording](#) from the Year-End Workday Wednesday session and familiarize yourself with the provided deadlines for various business processes. More information can also be found on the [UBC Finance Year-End webpage](#).

REMIND NEW HIRES TO COMPLETE ALL ONBOARDING

There has been a recent influx of new hires not receiving their pay via direct deposit. This is a result of incomplete onboarding tasks in their Workday inbox. Please remind new hires to complete **all onboarding tasks to ensure timely pay**. This includes the 'Federal and Provincial Withholding tasks'. If these tasks are not completed, the new hire will not receive their pay, even if they've completed their payroll elections/direct deposit tasks.

Helpful Onboarding Reports:

Onboarding Status Summary | Completion of UBC General Required Training for Onboarding
Employees Completed Onboarding Tasks by Sup Org | Employees Completed Onboarding Tasks by VP/Faculty
UBC New Worker Training Onboarding – 10 days past due)

TEMPORARY PROMOTIONS AND SECONDMENTS



PROCESSING A TEMPORARY PROMOTION OR SECONDMENT

The **Place Worker on Leave & Add Job** Business Processes are used to process Temporary Promotions/Secondments. This is **required** to maintain the employee's home position.



Do **NOT** use the Change Job business process to submit a Temporary Promotion/Secondment as this will remove the employee from their home position and their start dates in that position will be lost!

Note: If the temporary promotion/secondment is within the same supervisory organization, the same initiator can complete both Leave of Absence & Add Job BPs.



ENDING A TEMPORARY PROMOTION OR SECONDMENT

Three Business Processes are used to end Temporary Promotions/Secondments:



If the employee will be made permanent in the Temporary Promotion/Secondment position, the above steps must still be followed! Plus the additional step of submitting a Change Job BP (either direct or through Recruitment) to move them back into the temp promo/secondment position permanently.

Note: If the temporary promotion/secondment is within the same supervisory organization, the same initiator can complete the Switch Primary Job, End Job BP and Return from Leave of Absence BP.

LEGISLATIVE SICK LEAVE FOR STUDENT EMPLOYEES

The Legislative Sick Leave bank is configured for non-unionized student employees; however, it will only appear in their Time Off records after they have completed three months of service at UBC. Unionized student positions are not eligible for Legislative Sick Leave. If a student has multiple positions, one unionized and another eligible for the Legislative Sick Leave, a **Switch Primary Job** task should be completed in order to ensure the student can access the Legislative Sick Leave. If the student has multiple positions that are all eligible for the Legislative Sick Leave, then the Switch Primary Job task is not necessary. The student will be able to submit their absence and will have the option to select the position to which the absence is related.

WORKDAY EXPENSES REFRESHER

Need a refresher on Expenses in Workday? [This Expenses session](#) provides a great overview of everything you need to know related to Workday Expenses.

REMINDER: CLOSING POs

All Purchase Orders, even those with \$0.00 balances, need to be closed in Workday in order to accurately reflect obligation balances. [Find more information here.](#)



Contact the ISC

To speak directly to a service representative, or if the query is urgent, the ISC can be reached at **(250) 807-8163**. [Submit a ticket here.](#)

Hours of operation: Monday - Friday 8:00 a.m. - 5:00 p.m.

Need help with a ticket? Contact Lauren.Hatchard@ubc.ca.



Previous editions of IRP In the Know can be found at the [UBCO Workday Resources webpage](#).