

# IN THE KNOW

## UBCO Finance Operation's Newsletter

Finance Operations Updates and  
Important Information





## SOME VISUAL CHANGES IN WORKDAY

The latest Workday release included design updates to improve accessibility and visibility, as well as a new AI-enhanced search option, and other changes.

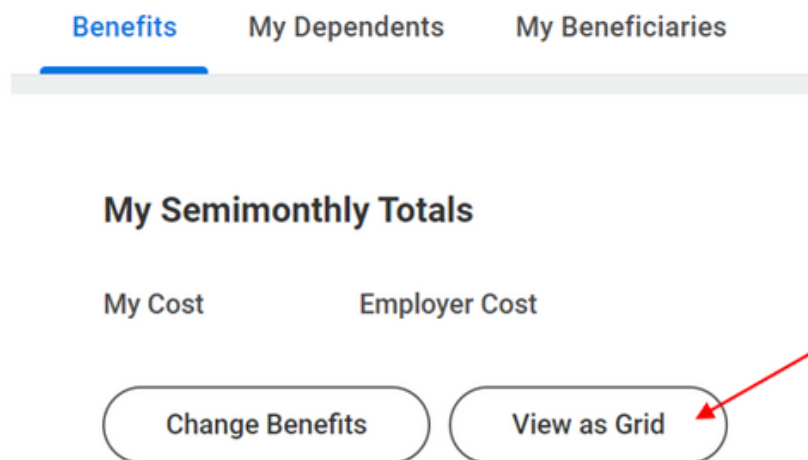
See details of the key changes [on the ISC website](#), and check the [Workday Knowledge Base](#) for new and updated resources.

## AUTOMATIC NEW FEATURE FOR BENEFITS - CHANGING THE DISPLAY OF BENEFIT PLANS FROM GRID/TABLE TO CARD FORMAT

Workday is changing the display of benefit plans from the current grid/table to card format in the following locations:

1. Worker's Profile > Benefits (often referred to as Benefits Summary)
2. Benefits and Pay Hub > Benefit Elections
3. Worker's Profile > Related Actions > Benefits > View My Current Benefit Elections

Employees will still have the option to display in the Grid Format if they prefer by clicking "View as Grid" and to print or download as a spreadsheet.



As well, benefit plans displayed during completion of benefit tasks will move to the new card format.

See [View My Benefits](#) job aid for a step-by-step guide showing these new changes.



## AAPS ADDITIONAL 5% SUPPLEMENTARY EMPLOYMENT BENEFIT (SEB) TOP-UP



AAPS employees who have taken a maternity, parental, or adoption leave may be eligible for the additional 5% SEB Top Up payment. To be eligible the employee must have:

- Been receiving SEB top up payments for the weeks entitled to top up during their leave
- Returned to work for a period of 6 months at the same FTE they were working at prior to their leave
- If an employee's FTE is reduced upon their return from leave, the 6 months will be prorated to reflect their FTE prior to commencing their leave
  - For example, if an employee's FTE was 1.0 before their leave and returned to 0.6 FTE, they would be required to work 10 months at a 0.6 FTE (10 months x 0.6 FTE = 6 months at 1.0 FTE)

Employees are responsible for applying for their SEB top up by advising their department manager when they have met the 6 months return to work requirement.

Managers or departmental administrators should then submit a request to payroll via a [Service Now Ticket](#) confirming the employee has met the return-to-work requirement and approving payroll to proceed with payment of the remaining top up.

## PROVINCIAL HEALTH NUMBER (PHN)



Employees who have had benefits since prior to Workday may show PHN “On File” under their Government IDs:

- It is very important that the employee enter their PHN information, including effective & expiration date if applicable (i.e. work permit) in their Workday profile under: Personal> IDs> Government IDs.

### Additional Government IDs 1 item

| Country | Government ID Type       | Identification # |
|---------|--------------------------|------------------|
| Canada  | Provincial Health Number | ON FILE          |

The Knowledge Base Article, [Enroll in Extended Health Benefits](#), can be used to illustrate and follow how to update your Personal Health Number (PHN).

## SUPPLIER INVOICE CODING STEP CHANGE TO ELIMINATE A TOTAL AMOUNT ERROR



To prevent an error related to the Total Amount Field in Workday, all Supplier Invoices will now have a Control Total amount of 0.00 when routed to departments for coding. Departments should not modify or change this value, and administrators should ensure this amount remains unchanged at 0.00 when sending the invoice back to Accounts Payable for review and approval.

Previously, when adding a worktag or adjusting Spend Categories, departments would sometimes encounter an error when the Control Total Amount did not match the Total Invoice Amount. With the new process, administrators will no longer receive this error as long as they keep the Control Total Amount at 0.00.

# NEW IN WORKDAY: IMPROVED GIFT & INITIATIVE REQUEST AND REVIEW PROCESS



## Requesters

When creating a request for a new Gift or Gift Initiative Worktag, requestors will now see two separate request forms for each type of worktag ('Worktag Request | Create Gift Worktag' and 'Worktag Request | Create Gift Initiative') as well as more detailed questions pertaining to the type of Endowment, purpose of the request and Donor agreement information (if applicable).

Additionally, to expedite the request and review process, all review steps and approvals will now occur within Workday. Those involved in the process, including requestors, should be mindful of reviewing notifications and any comments added to tasks in Workday.

## Gift Managers and Finance Administrators

To give Gift Managers and Finance Administrators more visibility into the details of a Gift or Gift Initiative Worktag in Workday, a new 'Additional Data' tab will now include information such as creation date, end date, sponsor name, etc.

This information will enable the campus to better analyze their endowments by different themes. Gift/Gift Initiative Worktag information can be changed or added to by submitting a [Workday Support Request](#) (Finance category/FDM sub-category).

[Learn more about Gift Workday and Gift Initiative Worktag on the Finance website](#)

## **REMINDER: FDM CHANGE REQUEST BLACKOUT DATES FOR FY2025 QUARTER ENDS**

To allow for successful Quarter Ends closures for the remainder of FY2025, some FDM change request types will not be made during these blackout dates:

- October 4 -16, 2024 (Q2)

For more information, visit the [UBC Finance website](#).

# IMPORTANT REMINDER

## VENDOR BANK ACCOUNT CHANGES



Vendors cannot make bank account changes in Workday themselves; someone from UBC needs to create the change request in the system. This can be done by the Department Admin or Procurement.

AP can't make the changes and shouldn't for obvious audit/fraud reasons. However, noting that vendors may inform UBC of any changes on an invoice submission, we are implementing a process where if this is the case Procurement will be notified by AP to assist.

However, if the Department is notified directly, they can make the change. If you are unsure about how to make a change please reach out to your Buyer for assistance or follow the [Supplier Change Request - None Contact Info](#) KBA.

Vendors will need to complete the EFT change forms found at [Payment Standards | UBC Finance](#) for either Canadian or US vendors. There is also a link on the same page for vendors outside Canada and the US using the GDS (global disbursement service). Just choose the form according to the vendor location. This form will need to be attached to the change request. This is the same form required at set up.

Same verification process will apply for change in bank details as is required in set up. A void cheque or a stamped letter from the bank or a stamped e-cheque will be required to make the change.

If there is a bank account change and there are pending payments, please reach out to Procurement to assist in making sure the payments will not be processed prior to the bank change being made.

Please contact the Procurement team if you have any questions around this.

## LANGUAGE IMPROVEMENTS TO EMPLOYMENT AGREEMENTS



Central HR has been updating the employment agreement language with a view to making the information on terms and conditions of employment more accessible, consistent and clear to employees. This means using the same language related to benefits, policies, and welcoming messages.

Starting from September 23, administrators will notice the new language being generated in new hire agreements for **M&P-AAPS** and **M&P-Excluded employees**. Additionally, this updated language will begin appearing in new hire agreements for other employee groups.

This marks the first phase of our project, which aims to review and enhance agreements throughout the employee lifecycle and across all groups.

## EMPLOYEE PHOTOS NO LONGER VISIBLE TO OTHER EMPLOYEES IN WORKDAY



The IRP Student team, with support from the ISC, recently changed [who can view employee profile photos](#) in Workday to meet the privacy requirements around student photos.

Previously, all UBC employees could view the profile photos of other employees. Now, employee photos will not be visible to other UBC employees, including HR roles and managers/leaders.

Profile photos are not being removed from Workday; employees will still see their own photos. This is intended to be an interim solution, and work on a way to restore employee photo visibility while meeting privacy requirements for students is in progress.

## WORKDAY WEDNESDAY SESSIONS



The Zoom links for the Workday Wednesday Sessions are now all the same link. Topics are found below for the next month, as well as posted on the “Events” calendar on the Workday Admins Team Channel.

Registration is not required, please copy link and session details to your calendar.

Workday Wednesday Zoom link:

[https://ubc.zoom.us/j/64655437858?](https://ubc.zoom.us/j/64655437858?pwd=ZDZybEZmNHJKSzgXM2htY1kwdEtMZz09)

[pwd=ZDZybEZmNHJKSzgXM2htY1kwdEtMZz09](https://ubc.zoom.us/j/64655437858?pwd=ZDZybEZmNHJKSzgXM2htY1kwdEtMZz09)

Meeting ID: 646 5543 7858

Passcode: 857874

**TOPIC: PAYMENTS: REFRESHER - SUPPLIER INVOICE REQUESTS, SUPPLIER ONE-TIME PAYMENTS, AND INDIGENOUS FINANCE GUIDELINES**

This session provides a refresher on paying suppliers when you don't have an invoice (Supplier Invoice Request, Supplier One-Time Payments), highlights key information to include with the request, and addresses common questions. The session will also review the process and key information when providing payments to Indigenous individuals.

**DATE/TIME: WEDNESDAY, OCTOBER 23, 2024 | 10:00 AM**

## VANCOUVER LED WORKDAY TRAINING

**TOPIC: SETTING UP A SUPPLIER: FOUNDATIONAL OVERVIEW**

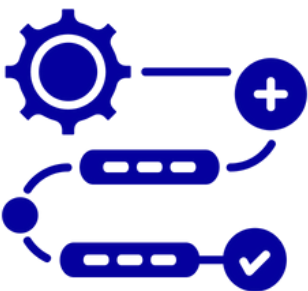
This course will help new and existing staff and faculty understand the basics of a supplier, including determining the correct payment method for a supplier, and the steps to setting up a supplier in Workday.

**OCTOBER 22, 2024**

**NOVEMBER 19, 2024**

**JANUARY 21, 2025**

[\*\*REGISTER THROUGH WPL\*\*](#)





## **PLANNING YOUR PURCHASING JOURNEY AT UBC: THE PO PROCESS**



Does needing to purchase goods and services leave you feeling lost? “*Planning your Purchasing Journey at UBC: The PO Process*” helps you navigate our purchase order process and requirements efficiently, ensuring smooth purchasing travels from start to finish.

**Tuesday, October 15, 2024 at 11:00 am**

**Tuesday, October 29, 2024 at 11:00 am**

[Course Registration](#)

## **SETTING UP A SUPPLIER: FOUNDATIONAL OVERVIEW**

This training benefits UBC Faculties and/or Staff who will start setting up suppliers, and helps the existing ones who may have questions about the foundations of the process.

**Tuesday, October 22, 2024 at 11:00 am**

**Tuesday, November 19, 2024 at 11:00 am**

[Course Registration](#)

**Registration is required, and these sessions fill up quickly. If you are interested in attending, please make sure to register in advance to ensure your spot for your training session.**



## PREVIOUS ENGAGEMENTS

To review previous Workday Wednesday Sessions and the available resources, please visit [here](#).

## RESOURCES

Below are some new and/or updated knowledge base articles for your reference:



### [Request Leave of Absence](#)

Published: October 1, 2024

- Summary: Step 3 list of leave types has been updated to clarify Maternity/Parental leave (pregnant partner) vs Parental Leave (non-pregnant birth parent) leaves in Workday.

### [Foundation Data Model \(FDM\) Worktags - Request New or Change](#)

Published: Sept 27, 2024

- Summary: Article has been updated with information about the process for requesting new or changes to Finance Organizational Gift and Gift Initiatives Worktags.

### [Search Features in Workday](#)

Published: Sept 23, 2024

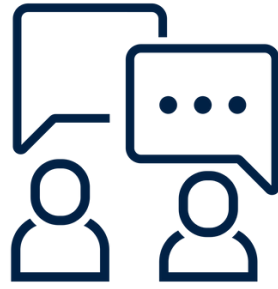
- Summary: Article now includes a section with information about new Simplified Search that offers Workday Assistant generated results to searches, as well as instructions on how to disable the feature.

### [Previous Newsletter](#)

### [Workday This Week](#)

### [KBA: Workday Assistant](#)

### [Navigating the Workday Home Page](#) (Updated)



## Contact the Integrated Service Centre

To speak directly to a service representative, or if the inquiry is urgent, the ISC can be reached at **(250) 807-8163**.

[Submit a Workday support request here](#)

Hours of operation: Monday - Friday | 8:00am - 5:00pm

