



Welcome to the
WesternU Family!

Western University
of Health Sciences

FY25 Budget Development (Phase II) & Annual Salary Adjustment

University Financial Services & Treasury and Office of Human Resources

Session Objectives

- ❖ Overview
- ❖ Budget Development Process Phase II
- ❖ Important Phase II Information and Dates
- ❖ Planning and Creating the FY2025 Budget
- ❖ Workday Training and Overview
- ❖ Budget Reallocation Using Workday Adaptive Insights
- ❖ Salary Adjustment Process
- ❖ Questions and Answers



Teams Presenting

UFS&T will provide information on the Budget Development Phase II Process

AND

The Office of Human Resources will provide information on the
Annual Salary Adjustment Process



Budget Development Process Phase II




- Collaboratively Analyze FY 2024 Budget and Historical Spending Trends
- Leverage Workday to Reallocate FY25 Operating and Capital Expenses
- Collaboratively Prepare and Balance FY 2025 Budget



Important Phase II Information and Dates

- 3% Annual Salary Adjustment
- 33.2% Fringe Benefit Rate (Full-Time)
- 18% Fringe Benefit Rate (Part-Time)
- Complete Workday Financial Coordinator Authorization Form
- Reallocate Budget Using FY25 Phase II Version, in Workday Adaptive Insights
- Ensure “Budget Reallocation (FY25)” Process Task is Completed in Workday
- Budget Development Phase II Deadline: May 20, 2024

Planning and Creating the FY 2025 Budget

- Identify historical spending patterns and anticipated expenditures affecting your budget.
 - **Workday Report:**  [4. Yearly Trend \(FY17-FY23 Actuals\)](#)
- Review current and prior year's budget vs. actual variance analysis to identify variances between 7 series expense accounts.
 - **Workday Report:**  [7. Budget Vs Actual \(FY23\)](#)  [8. Budget Vs Actual \(FY24 YTD\)](#)
- Review and make note of expense accounts with budget overages/surpluses for budget reallocation (adjustments).
- Review your strategic business plan and potential impact on your budget.

Using Workday For FY25 Budget Reallocation

- Provides easy to use ad hoc reporting for analysis.
- Simplifies the FY25 budget reallocation process by providing insights on historical spending patterns in one place.
- Provides the ability to view reallocated FY25 budget at a department and rollup level to simplify the balancing process.



Reallocating the Budget

This is the time to make permanent across the board budget adjustments for FY25.



All accounts need to be adjusted based on historical spending patterns and anticipated expenditures.

Accessing Workday

Via: <https://my.westernu.edu/>

The dashboard contains the following tiles:

- Self-Service BanWeb**: Features an illustration of a laptop with 'BANWEB' on the screen, a potted plant, and a mug.
- Workday**: Displays the Workday logo (a blue 'W' with an orange arch above it).
- University Risk Management**: Includes an illustration of people and a sign, with text: "The Office of Risk Management ensures to protect of the physical, human resources, and financial assets of the University while reducing exposure to accident loss before it occurs. It has the responsibility of carrying out the policies of the University in systems."
- Services**: Lists links for Facilities Service Request, Notary Services, Skill Share, IT Support, and Space Planning & Management.
- Employee Resources**: Lists various HR-related links such as 2023 Hourly Payroll Calendar, 2023 Salary Payroll Calendar, ADP - Time Card/Reporting, Phone Directory, Discounts, Employee Assistance Program, Employee Benefits Resource Center, Employee Evaluations, Employee Handbook, Employee Policies, Employee Self-Service Profile*, Faculty Handbook, and Forms*.
- Application Systems**: Lists various software applications including Concur, Elxir, Google Docs, LinkedIn Learning, My Mediasite, Office 365, Qualtrics, Resource Scheduler, Self-Service BanWeb, SharePoint, and Workday.

Directly: <https://login.adaptiveinsights.com/app>

The login page includes the following elements:

- Username or Email ***: A text input field with a yellow border and an arrow labeled 'S1' pointing to it.
- Password ***: A text input field with a yellow border, highlighted with a yellow box containing the text "Leave password blank. SSO connected." and an arrow labeled 'S1'.
- Sign In**: A blue button with a yellow border and an arrow labeled 'S2' pointing to it.
- Forgot Password**: A link below the Sign In button.
- Workday Logo**: A large logo on a blue background.
- WORKDAY ADAPTIVE PLANNING**: Text below the logo.
- Footer**: Copyright notice: "© 2022 Workday, Inc. All rights reserved. Proprietary and Confidential." and "Workday is powered by 100% renewable energy."

Workday Overview – Accessing Processes Tasks

The screenshot displays the Workday interface for Western University of Health Sciences. The navigation menu on the left is highlighted in blue, with the 'Processes' option selected and highlighted in a darker blue. A yellow arrow labeled 'S1' points to the hamburger menu icon in the top left. A yellow arrow labeled 'S2' points to the 'Processes' option in the navigation menu. A yellow arrow labeled 'S3' points to the 'Overview' option in the 'Processes' sub-menu. The main content area shows a table with columns for 'Input', 'Location', and 'Last Viewed'. The table contains several rows of data, including 'ML', 'Shared', and dates like '4 hours ago', 'March 13, 2024', 'March 15, 2024', and 'a day ago'. The top right of the interface shows 'FY25 Phase II' with a dropdown arrow, a help icon, and a user profile icon labeled 'BO'.

Western University
Western University of Health Sciences | Home

FY25 Phase II ▾ ? BO

Home
Sheets
Reports >
Dashboards
Scenarios
Announcements >
Processes >

Processes
Overview
Multi-Year Planning

Input	Location	Last Viewed
ML	Shared	4 hours ago
ML	Shared	March 13, 2024
ML	Shared	March 15, 2024
ML	Shared	a day ago

Workday Overview – Tasks Dashboard

S1: Select “Me”, so that you are only able to view your tasks. Confirm that the Process selected is “Multi-Year Planning”.

S2: Complete the Budget Reallocation task listed under “Tasks in Progress” by due date specified.

S3: To access each task, you will have to click on the [title link](#), and it will take you directly to the sheet required to be completed.

The screenshot displays the 'Processes / Overview' page in Workday. At the top, the breadcrumb 'Processes / Overview' is visible. The user profile 'BO' is in the top right corner. Below the breadcrumb, there are two dropdown menus: 'Assigned to: Me' and 'Process: Multi-Year Planning'. A yellow arrow labeled 'S1' points to the 'Assigned to' dropdown. The main content area features a large grey circle with the number '0' on the left, and a green donut chart on the right showing 'Overall progress: 1%'. Below the donut chart, a list of task statistics is provided: '1 tasks completed', '50 tasks in progress', and '0 tasks running late'. At the bottom, there are two tabs: 'Tasks in Progress' and 'Tasks Completed'. The 'Tasks in Progress' tab is active, showing a task card for 'Budget Reallocation (FY25)'. A yellow arrow labeled 'S2' points to the 'Tasks in Progress' tab, and another yellow arrow labeled 'S3' points to the task title 'Budget Reallocation (FY25)'. The task card includes a calendar icon, a user icon, the due date 'Due May 20, 2024 11:59 PM PDT', the user profile 'BO', and a green 'Incomplete' status with a dropdown arrow.

Note: To go back to your task dashboard to view all tasks, you will have to go back to Processes from menu bar, as shown on previous slide.

Budget Reallocation

S1: Confirm you have selected FY25 Phase II **S2:** Select ORG to view and reallocate funds

#	FUND (DIM)	LEVEL ▲	GL ACC...	FY21 ...	FY22 ...	FY23 ...	FY24 ADOPTED ...	REALLOCATION...	FY25 PROPOSED ...	FROM (ORG-ACCOUNT, \$ AMOUNT)	NOTES
35	1100 - Cur...	1111 - ...	71580 - ...	0	0	221	85		85		
36	1100 - Cur...	1111 - ...	71590 - ...	83	167	0	0		0		
37	1100 - Cur...	1111 - ...	7920 - E...	3,969	0				0		
38	1100 - Cur...	1111 - ...	79208 - ...	0	590				0		
39	1100 - Cur...	1111 - ...	79209 - ...	2,567	2,154				0		
40	1100 - Cur...	1111 - ...	7925 - F...	0	3,172				0		
41	1100 - Cur...	1112 - ...	70211 - ...	450	734	815	0		0		
42	1100 - Cur...	1112 - ...	70211 - ...	2,541	2,678	2,664	698		698		
43	1100 - Cur...	1112 - ...	70280 - ...	610	722	725	720		720		
44	1100 - Cur...	1112 - ...	70302 - ...	764	2,188	1,631	6,300		6,300		
45	1100 - Cur...	1112 - ...	70302 - ...	5,792	3,496	1,597	12,150		12,150		

Additional Information:

- At the rollup level, you will see information for all your departments/Orgs.
- Information provided by Workday includes Fund, Level/Org, GL Account, Actuals for prior three years...etc.
- In Workday, you will have the ability to view **three years of historical actuals** data.

Budget Reallocation

S3: Enter the increase/decrease (-) amount under the Reallocation of Budget column.

S4: When increasing budget, enter where funds are moving from and the amount in the FROM (ORG-ACCOUNT, \$ Amount) column.

S5: Additional information can be provided under the Notes column.

S6: Click the Save icon to calculate the changes. The new amount will be reflected under Proposed Budget.

S7: Repeat steps 1 through 6 for all Orgs you will be reallocating budget.

f Health Sciences | Sheets / Phase II - Budget Reallocation FY25 Phase II ▼ ? BO

fx S6 Save Download Print Share Refresh Filter Levels 1111 - Department A ▼ +

#	FUND (...)	GL ACCOUNT	FY21 ...	FY22 ...	FY23 ...	FY24 ...	REALLOCATION OF BUDGET	FY25 PROPOSED ...	FROM (ORG-ACCOUNT, \$ AMOUNT)	NOTES
28	1100 - ...	71473 - Subscriptions	0	0	102	128		128		
29	1100 - ...	71505 - Computer Supplies	418	1,652	281	0		0		
30	1100 - ...	71530 - Event Supplies	3,618	1,141	3,165	7,735		7,735		
31	1100 - ...	71551 - Medical Supplies	0	4,729	0	0		0		
32	1100 - ...	71555 - Meeting Supplies	0	640	431	2,975	S3 -1,000	2,975	S4 1111-71555, \$1,000	S5
33	1100 - ...	71560 - Office Supplies	135	423	1,273	850	1,000	0		
34	1100 - ...	71575 - Postage	67	59	36	0		0		
35	1100 - ...	71580 - Reprographics	0	0	221	85		85		
36	1100 - ...	71590 - Student Supplies	83	167	0	0		0		
37	1100 - ...	7920 - Equipment	3,969	0				0		
38	1100 - ...	79208 - Equipment-Audio Visual	0	590				0		
39	1100 - ...	79209 - Equipment-Laptop Comput...	2,567	2,154				0		
40	1100 - ...	7925 - Furniture	0	3,172				0		
41	Total		15,858	30,588	32,476	38,675	0	38,675		

Budget Reallocation Balancing

S8: For reallocation balancing, please make sure the highest rollup level is selected to ensure that the reallocation total is equal to Zero.

of Health Sciences | Sheets / Phase II - Budget Reallocation FY25 Phase II ▼ ? BO

fx 📄 📥 📋 📌 📁 🔍 🔄 ☰ S8 → Levels Department / Organization ▼ +

#	FUND ...	LEVEL	GL AC...	FY21 ...	FY22 ...	FY23 ...	FY24 ADOPTED B...	REALLOCATION ... ▲	FY25 PROPOSED ...	FROM (ORG-ACCOUN...	NOTES
101	1100 -...	1112 - D...	7724 - ...	846	1,546	401	6,997		6,997		
102	1100 -...	1111 - D...	71530 ...	3,618	1,141	3,165	7,735		7,735		
103	1100 -...	1111 - D...	70308 ...	-22	0	8,519	8,500		8,500		
104	1100 -...	1112 - D...	7721 - ...	501	2,435	1,072	9,042		9,042		
105	1100 -...	1112 - D...	70550 ...	870	624	0	9,450		9,450		
106	1100 -...	1112 - D...	7726 - ...	0	710	25,150	10,418		10,418		
107	1100 -...	1112 - D...	7723 - ...	4,639	6,278	6,890	10,800		10,800		
108	1100 -...	1112 - D...	70302 ...	5,792	3,496	1,597	12,150		12,150		
109	1100 -...	1111 - D...	71560 ...	135	423	1,273	850	1,000	1,850	1111-71555, \$1,000	
110	Total			89,718	92,953	162,1...	158,899	S8 → 0	158,899		

Budget Reallocation – Completing Task

S9: Once you have completed your task, go to Processes from the menu bar. Click Incomplete and the status will change to Complete.

The screenshot shows a task card titled "Budget Reallocation (FY25)" with a due date of "May 20, 2024 11:59 PM PDT". The card is currently in the "Tasks in Progress" section. A yellow arrow labeled "S9" points to the "Incomplete" status button, which is highlighted with a yellow border. The user's initials "BO" are visible in a blue circle next to the status button. The "Tasks Completed" section is empty, displaying "There are no completed tasks".

The screenshot shows the same task card, "Budget Reallocation (FY25)", now in the "Tasks Completed" section. The status has changed to "Complete", which is highlighted with a yellow border. The completion date is "Apr 23, 2024 5:12 PM PDT". The "Tasks in Progress" section is now empty, displaying "There are no tasks in progress". The user's initials "BO" are still visible next to the status button.

Additional Training & Resources

Additional Training/Working Sessions Will be Available Through CETL

- May 1, 2024 at 2pm
- May 7, 2024 at 2pm
- May 15, 2024 at 11am



WWW Visit the [Office of Budget Administration Site](#)



For any additional questions, please email Budget@westernu.edu.

Budget Development Questions and Answers



Annual Salary Adjustment

What: Annual salary adjustment percentage amount is 3%.
Salary Budget Worksheets are no longer required.

Who: All active employees of WesternU (full-time, part-time and temporary) paid from the general operating budget who were hired prior to April 1, 2024, and didn't receive another type of salary increase April 1, 2024, or after.

When: Effective July 1, 2024.

Additional Salary: Justification Form



Additional Annual Salary Adjustment Request Form (Retention, performance, equity, other-please specify)

The window to begin requesting additional salary adjustments commences July 2, 2024. Please note that each submission will be reviewed. However, approval of submission is not guaranteed. This form should not be used for promotions.

Email approved forms and attachments to compensation@westernu.edu by August 30, 2024

Requestor Information			
Date of Request:		Requestor Email	
Requestor Name:		Requestor Title:	

Employee Information			
Employee Name:		Request for (Add specifics to the Justification for Increase section):	
Employee PCN:		Employee ID#:	@
Employee Position Title:		Employee FLSA:	
Employee Department/College		Employee FTE:	

Change Summary	
Current Base Salary:	\$
Percent Increase (Percent of Current Base Salary):	%
Amount of Increase (\$):	\$
Proposed New Base Salary:	\$
Effective Date:	10/1/2024

Justification for Increase (please attach additional sheet if more room is needed)

Proposed Funding Source and Budget Information (FOAPAL)					
PCN/Other Line	FUND	ORG	ACCT	PROG/ACT	AMOUNT

Director of Operations /Financial Coordinator (Print Name and Signature) _____ Date _____

Dean/ Department Head (Print Name and Signature) _____ Date _____

Human Resources Review Signature _____ Date _____ Budget Review Signature _____ Date _____

Use this form for:
Equity
Performance
Retention

Other – Please specify

Instructions and FAQ will be available

This form should not be used for promotions.

Important Dates

July 2024	August 2024	September 2024	October 2024
Jul 1: 3% Salary Increases Begin	Aug 30th: Due: Additional Annual Salary Adjustment Request Form	Class & Comp Review: Additional Annual Salary Adjustment	Oct 1: Effective: Additional Annual Salary Adjustment
Jul 2: Available: Additional Annual Salary Adjustment Request Form			
Email: compensation@westernu.edu			

PEOPLEADMIN Actions

Grants and Contracts Positions: Please remember to submit People Admin Action Forms for any grant/contract eligible positions by May 31, 2024.

Soft Funding Positions: Please remember to submit People Admin Action Forms for any soft funding, increase eligible, positions by May 31, 2024.

Faculty Promotion & Tenure: Please remember to submit People Admin Action Forms for faculty receiving Promotion and Tenure.



Promotions

- All promotions must be submitted through PEOPLEADMIN.
 - Promotions will be effective July 2, 2024.
 - All promotions effective July 2nd, are due no later than May 31, 2024.
- ❖ Promotions effective after July 2nd, can be submitted throughout the year.



Annual Salary Adjustment Questions and Answers





**Thank
you**