



FY26 Annual Salary Adjustment & Budget Development (Phase II)

Office of Human Resources and University Financial Services & Treasury

April 21, 2025

Session Objectives

- ❖ Overview
- ❖ Salary Adjustment Process
- ❖ Budget Development Process Phase II
- ❖ Important Phase II Information and Dates
- ❖ Planning and Creating the FY2026 Budget
- ❖ Workday Training and Overview
- ❖ Budget Reallocation Using Workday Adaptive Insights
- ❖ Questions and Answers



Teams Presenting

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

AND

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



Annual Salary Adjustment

What: Annual salary adjustment percentage amount is 2%.

Who: Eligible, regular active employees of WesternU paid from the general operating budget who were hired prior to April 1, 2025, and did not receive another type of salary increase April 1, 2025, or after.

The following position types are excluded from the annual salary adjustment:

- Vacant Positions
- Temporary Employees (including Adjunct Faculty)
- Federal Work Study
- Teaching Assistants
- Standardized Patients
- Soft Funded Positions (Non-Operating Fund Funded)

When: Effective July 1, 2025.

PEOPLEADMIN Actions

Grants and Contracts Positions: Annual increases are based on the grant budget. Please contact Office of Sponsored Programs and Contract Management.

Soft Funding Positions: Please remember to submit People Admin Action Forms for any soft funding, increase eligible, positions by **noon** on May 30, 2025.

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

PA Actions: Important Considerations

People Admin (PA) Actions with an effective date of July 1, 2025, will not be processed to accommodate for the processing of the annual salary adjustments.

PA Actions with an effective date of July 2, 2025, must be submitted by **noon** on May 30, 2025.

PA Actions submitted after July 2, 2025 with retroactive dates may not be approved.

For any increases submitted for July 2, 2025 the department will need to use the base pay budget including the 2%.

Promotions

- All promotions must be submitted through PEOPLEADMIN.
- Promotions will be effective July 2, 2025.
- All promotions effective July 2, 2025, must be submitted no later than **noon** on May 30, 2025.
- Promotions effective after July 2, 2025, may be submitted throughout the year.



Important Phase II Information

- 2% Annual Salary Adjustment
- 33.2% Fringe Benefit Rate (Full-Time)
- 18% Fringe Benefit Rate (Part-Time)

Annual Salary Adjustment Questions and Answers



Budget Development Process Phase II Overview

- Collaboratively Analyze FY 2025 Budget and Historical Spending Trends
- Leverage Workday to Reallocate FY26 Operating and Capital Expenses
- Collaboratively Prepare and Balance FY 2026 Budget



Planning and Creating the FY 2026 Budget

- Identify historical spending patterns and anticipated expenditures affecting your budget.
 - **Workday Report:**  [4. Yearly Trend](#)
- 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 \(FY24\)](#)  [8. Budget Vs Actual \(FY25 YTD\)](#)
- 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 FY26 Budget Reallocation

- Provides easy to use ad hoc reporting for analysis.
- Simplifies the FY26 budget reallocation process by providing insights on historical spending patterns in one place.
- Provides the ability to view reallocated FY26 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 FY26.



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

Accessing Workday

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

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

The dashboard contains the following tiles:

- Self-Service BanWeb**: Features an illustration of a laptop with 'Self-Service BANWEB' on the screen.
- Workday**: Displays the Workday logo (a blue 'W' with an orange arch above it).
- University Risk Management**: Includes a graphic of people and a text description: "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 to ensure..."
- 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 external systems including Concur, Elixir, Google Docs, LinkedIn Learning, My Mediasite, Office 365, Qualtrics, Resource Scheduler, Self-Service BanWeb, SharePoint, and Workday. A yellow arrow labeled 'S1' points to the Workday link.

Username or Email *

Password *

Leave password blank.
SSO connected.

Sign In

Forgot Password

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Workday is powered by 100% renewable energy.



Workday Overview – Accessing Processes Tasks

The screenshot displays the Workday user interface for Western University of Health Sciences. At the top left, a yellow arrow labeled 'S1' points to the hamburger menu icon. The header includes the Western University logo, the text 'Western University of Health Sciences', and a 'Home' link. On the top right, there is a dropdown menu for 'FY26 Phase II', a help icon, a notification bell, and a user profile icon labeled 'BO'. A blue navigation sidebar on the left contains the following items: Home, Sheets, Reports, Dashboards, Scenarios, Announcements, and Processes. A yellow arrow labeled 'S2' points to the 'Processes' item, which is highlighted in a darker blue. To the right of the sidebar, a secondary menu is open, showing 'Processes' and 'Multi-Year Planning'. Under 'Processes', the 'Overview' item is highlighted with a yellow box and a yellow arrow labeled 'S3'. The main content area on the right is dark grey and partially obscured, showing a list of items with labels like '(Actuals)', 'Comparison (Actuals)', and 'Y24 Actuals'.

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. On the right, there are icons for help, notifications, and a user profile labeled 'BO'. Below the breadcrumb, there are two dropdown menus: 'Assigned to: Me' and 'Process: Multi-Year Planning', both highlighted with yellow boxes and labeled 'S1'. The main dashboard area features a large blue circle with the number '0' on the left, and a central section titled 'Overall progress: 58%' with a donut chart showing 58% completion. The progress summary includes: 105 tasks completed, 53 tasks in progress, and 22 tasks running late. Below this, there are two task lists. The 'Tasks in Progress' list is highlighted with a yellow box and labeled 'S2', showing a task titled 'Budget Reallocation (FY26)' with a due date of 'May 23, 2025 11:59 PM PDT' and a status of 'Incomplete'. The 'Tasks Completed' list is empty, showing 'There are no completed tasks'.

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 ACCOU...	FY22 ...	FY23...	FY24 ...	FY25 ADOPTED ...	REALLOCATION...	FY26 PROPOSED ...	FROM (ORG-ACCOUNT, \$ AMOU...	NOTES
22	1100 - Cur...	1111 - ...	70823 - Co...	0.00	0.00	846.02	0		0		
23	1100 - Cur...	1111 - ...	70910 - Co...	0.00	0.00	0.00	3,655		3,655		
24	1100 - Cur...	1111 - ...	70930 - W...	224.40	266...	0.00	0		0		
	1100 - Cur...	1111 - ...	70935 - H...	1,657...	1,46...	2,040...	0		0		
	1100 - Cur...	1111 - ...	70950 - Pri...	54.36	0.00	0.00	0		0		
27	1100 - Cur...	1111 - ...	713015 - S...	11.53	0.00	506.24	85		85		
28	1100 - Cur...	1111 - ...	71410 - Bo...	122.27	134...	322.87	0		0		
29	1100 - Cur...	1111 - ...	71475 - Su...	0.00	0.00	101.98	128		128		
30	1100 - Cur...	1111 - ...	71505 - Co...	418.20	1,65...	281.03	0		0		
31	1100 - Cur...	1111 - ...	71530 - Ev...	3,617...	1,14...	3,165...	7,735		7,735		
32	1100 - Cur...	1111 - ...	71551 - M...	0.00	4,72...	0.00	0		0		

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.

#	FUND...	GL ACCOUNT	FY22...	FY23 ...	FY24...	FY25 ...	REALLOCATION OF BUDGET	FY26 PROPOSED BUDG...	FROM (ORG-ACCOUNT, \$ AMOUNT)	NOTES
1	1100 -...	70055 - Marketing	0.00	0.00	1,032...	0		0		
2	1100 -...	70211 - Cellular Phone Stipend	215....	289.00	442.00	0		0		
3	1100 -...	70280 - Telephone	954....	1,120...	1,126...	1,190		1,190		
>	1100 -...	70302 - Faculty Development	412....	0.00	293.25	6,375	S3 → -1,000.00 1,000.00	S4 → 0	1111-70280, \$1,000	← S5
	1100 -...	70304 - Employee Events Including Meals	0.00	36.97	0.00	0		0		
6	1100 -...	70306 - Employee Meals Expense	0.00	563.13	840.39	0		0		
7	1100 -...	70307 - Per Diem Meals	0.00	221.58	376.48	0		0		
8	1100 -...	70308 - Non Employee Meals	-21.91	0.00	8,519...	8,500		8,500		
9	1100 -...	70310 - Registration Fees	475....	2,085...	3,786...	1,020		1,020		
10	1100 -...	70311 - Hotel	0.00	1,113...	1,615...	0		0		
11	1100 -...	70313 - Transportation	0.00	150.45	931.08	850		850		
12	1100 -...	70360 - Standard Mileage Reimbursement	0.00	27.35	270.11	850		850		

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.

#	FUND (DIM)	LEVEL ▲	GL ACCOU...	FY22 A...	FY23 A...	FY24 A...	FY25 ADOPTED B...	REALLOCATIO...	FY26 PROPOSED BU...	FROM (ORG-ACCO...	NOTES
104	1100 - Cur...	1112 - D...	7721 - Ess...	500.58	2,435.26	1,071.52	9,042		9,042		
105	1100 - Cur...	1112 - D...	70211 - Ce...	450.00	733.50	814.50	0		0		
106	1100 - Cur...	1112 - D...	71599 - Ot...	0.00	20.72	12.80	0		0		
107	1100 - Cur...	1112 - D...	71590 - St...	56.93	0.00	0.00	0		0		
108	1100 - Cur...	1112 - D...	71560 - Of...	603.17	1,201.29	1,333.37	1,280		1,280		
109	1100 - Cur...	1112 - D...	71575 - Po...	0.88	0.48	0.57	0		0		
110	1100 - Cur...	1112 - D...	71563 - St...	313.00	149.64	79.28	0		0		
111	Total			89,718...	92,953...	162,16...	158,899	0.00	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 image displays two side-by-side screenshots of a task management interface, illustrating the process of completing a task.

Left Screenshot: Shows a task titled "Budget Reallocation (FY26)" with a due date of "May 23, 2025 11:59 PM PDT". The task is currently in the "Tasks in Progress" column. A yellow arrow labeled "S9" points to the "Incomplete" button, which is highlighted with a yellow box. The "Tasks Completed" column is empty, displaying "There are no completed tasks".

Right Screenshot: Shows the same task, "Budget Reallocation (FY26)", now with a completion date of "Apr 25, 2025 5:01 PM PDT". The task has moved to the "Tasks Completed" column, and the "Complete" button is highlighted with a yellow box. The "Tasks in Progress" column is now empty, displaying "There are no tasks in progress".

Important Phase II Information and Dates

- Complete Workday Financial Coordinator Authorization Form
- Reallocate Budget Using FY26 Phase II Version, in Workday Adaptive Insights
- Ensure “Budget Reallocation (FY26)” Process Task is Completed in Workday
- Budget Development Phase II Deadline: May 23, 2025

FY26 Budget Reallocation Additional Sessions & Resources

Open Q&A Sessions Will be Available

- May 6, 2025 at 2pm
- May 8, 2025 at 11:30am
- May 13, 2025 at 3pm
- May 15, 2025 at 11:30am
- May 20, 2025 at 2pm
- May 22, 2025 at 11:30am



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



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

Budget Development Questions and Answers



