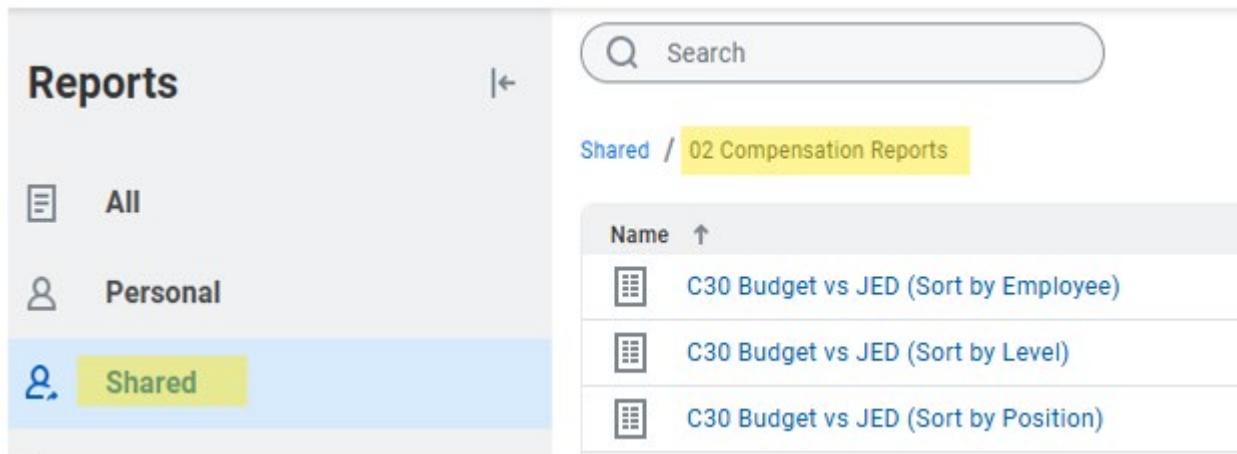


FY27 Compensation Basic Guide

To start the budget process, first verify the correct people are displaying in your departments. Start by running a Workday Planning (WP) 'C30 Budget vs JED' report for your department.

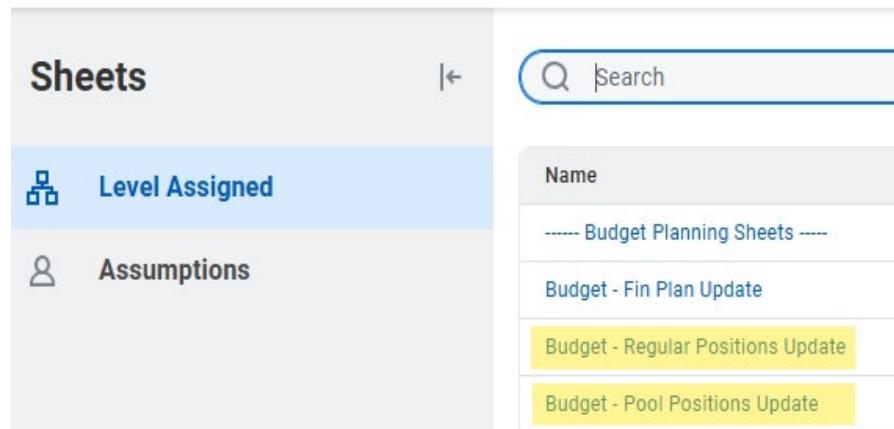


The screenshot shows the 'Reports' page in Workday. The left sidebar has 'All', 'Personal', and 'Shared' sections, with 'Shared' selected and highlighted in yellow. The main area shows a search bar and a list of '02 Compensation Reports'. The list is sorted by name and includes three items: 'C30 Budget vs JED (Sort by Employee)', 'C30 Budget vs JED (Sort by Level)', and 'C30 Budget vs JED (Sort by Position)'. The 'C30 Budget vs JED (Sort by Employee)' report is also highlighted in yellow.

- Regular benefit-eligible positions were seeded with data from the Job Earnings Distribution (JED) compensation details for employees from PeopleSoft HR on 1/27/26.
- No additional earnings were seeded.
- Pool positions were carried forward from the FY27 Budget, but no amounts were seeded.

The position budget process in Workday uses two data entry sheets:

- Budget - Regular Positions Update
- Budget - Pool Positions Update



The screenshot shows the 'Sheets' page in Workday. The left sidebar has 'Level Assigned' and 'Assumptions' sections, with 'Level Assigned' selected and highlighted in blue. The main area shows a search bar and a list of 'Name' entries. The list includes '----- Budget Planning Sheets -----', 'Budget - Fin Plan Update', 'Budget - Regular Positions Update' (which is highlighted in yellow), and 'Budget - Pool Positions Update' (which is also highlighted in yellow).

If any DPE (Department-Position-Employee) needs to be removed, use the Delete Row buttons on the top tool bar.



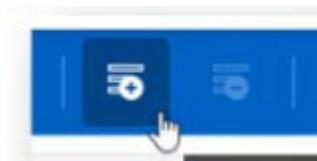
*Note that there is no undo option, and data cannot be reseeded.

Unit 5 – Page 4 Entering Pool Positions - *Best practice is to budget part-time/temporary DPEs in a pool.

Actuals based on mapping details will still roll to the pooled positions regardless of if the pool was budgeted. If a new line was added for a pool, please be sure to add the applicable tax rates to the 'SS Rate' & Medicare Rate' columns. The 'taxes' flag must be marked 'yes' and rates must be entered for the taxes to calculate.

POOL POSITION CODE	POOL POSITION DESCRIPTION	DEFUALT ACCOUNT	ACCOUNT DESCRIPTION	PERSON BENEFIT	BASED BENEFITS	LBR	TAXABLE ITEM	MAPPING DESCRIPTION	
								Typical Benefit Flags -	
P98000001	Other Academic Non Faculty	703800	S&W Non-Ben Elg Acad (non-faculty)	No	No	No	Yes	Occupational Groups 21; 23; 25 (except 8391, 5800, 8390, 4680, 6669, 7761-8)	
P98000002	Adjunct and Temp Faculty	703500	S&W Non-Ben Elg Faculty excl TNR	No	No	No	Yes	Occupational Groups 26; 27 (except job code 1700); 28 (except 0930); 29 (except 7160, 3503, 3148, 3481) and include job codes 8391, 5800, 8390 (these job codes are from Occupational group 25) and R/T flag T	
P98000003	Call Pay	705000	S&W Benefit Eligible Staff	No	Yes	No	Yes	Call Pay Earn Codes	
P98000004	Event Staff	705500	S&W Non-Benefit Eligible Staff	No	No	No	Yes	Job code 3765 and R/T flag T	
P98000005	GTA/GRA	704000	S&W Graduate Student	No	No	No	No	Occupational Group 22; includes job code 4680 from Occupational Group 23	
P98000006	Overtime	708050	S&W Overtime	No	No	No	Yes	Overtime Earn codes	
P98000007	Part Time	705500	S&W Non-Benefit Eligible Staff	No	No	No	Yes	Occupational Groups not equal to 2.x and 8.x with R/T flag T and exclude event staff job 3765	
P98000008	Salary Reserve	700000	Unspecified Financial	No	Yes	Yes	Yes	Budget only pool, actuals will not map to the pool	
P98000009	Shift Differential	705000	S&W Benefit Eligible Staff	No	Yes	No	Yes	Shift Differential Earn Codes	
P98000010	Student Employees	707100	S&W Non-Academic	No	No	No	No	Occupational Group 81 and job code 6669 from Occupational Group 21.	
P98000011	Summer Pay Benefit Eligible	701000	S&W Tenure / Tenure-Track Faculty	No	Yes	No	Yes	Occupational Groups 26; 27 (except job code 1700); 28 (except 0930); 29 (except 7160, 3503, 3148, 3481) and include job codes 8391, 5800, 8390 (these job codes are from Occupational group 25) and R/T flag R and Summer	
P98000012	Resident Physician YR 1-8	702500	S&W Ben Elg Academic (Non-Faculty)	No	No	No	Yes	Job codes 7761-7768	
P98000020	Faculty Grant	700000	Unspecified Financial	No	Yes	No	Yes	Budget only pool, actuals will not map to the pool	
P98000021	Physician Teaching	700000	Unspecified Financial	No	Yes	No	Yes	Budget only pool, actuals will not map to the pool	
P98000022	Merit Pay Reserve	700000	Unspecified Financial	No	Yes	Yes	Yes	Budget only pool, actuals will not map to the pool	
P98000023	MPP Incentive	708400	S&W MPP Incentive Pay	No	No	No	Yes	MPP Earn Code and PS Account 708400	
P98000024	SOM Incentive Pay	708425	S&W Incentive Pay Other	No	No	No	Yes	INC Earn Code, PS Account 708425, and CMED	
P98000025	Attrition	700000	Unspecified Financial	No	Yes	Yes	Yes	Budget only pool, actuals will not map to the pool	
P98000026	Covid-19 Savings	700000	Unspecified Financial	No	Yes	No	Yes		
P98000027	Purchased Staff Time	708450	S&W Purchased Staff Time	No	No	No	No		
P98000028	Purchased Faculty Time	708350	Purchased Faculty Time	No	No	No	No		
P98000029	High School College Program	701500	Ben Eligible Faculty Excl TNR	No	No	No	Yes		
P98000030	Leave Rate Pool	710027	Leave Rate Temp Pool Planning	No	No	No	No		
P98000031	Vacation Payout	705000	S&W-Benefit Eligible Staff	No	Yes	No	Yes		
P98000032	Other Staff	718000	SB - Other	No	No	No	No		

If any position is missing (e.g. positions created after 1/27/26 or vacant positions as of 1/27/26), you have the option to budget that position using a pool, or you can budget the individual position as follows:



Use the 'Add Row' button on the top tool bar *or* to save time, copy an existing row (right-click 'Copy Row') then make changes instead of rekeying every field.

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*It is important to review the full list of staff, students and faculty. Please verify that positions budgeted by employee are not also included in a pool.

Dimension Values
P97001000 - New Position - Tenure/Track Faculty
P97001500 - New Position - Benefit Eligible Faculty
P97002500 - New Position - Benefit Eligible Academic
P97003500 - New Position - Non-Benefit Eligible Faculty
P97003800 - New Position - Non-Benefit Eligible Academic
P97004000 - New Position - Graduate Student Assistant
P97005000 - New Position - Benefit Eligible Staff
P97005500 - New Position - Non-Benefit Eligible Staff

To add a new position that has not been created through HR, use the populated dummy positions. Enter "new" or "P97" in the search bar and select the appropriate dummy position from the list.

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To obtain a dummy emplid run the '**C90 New Employee Placeholders Currently Available**' report in WP. Choose 'COLUM'

Name
C95 BUDGET CURRENT New Employee Placeholders - In Use
C94 BUDGET CURRENT New Employee Placeholders - Available
C93 Comp Rate Change Assumptions NY
C91 BUDGET WORKING New Employee Placeholders - In Use
C90 BUDGET WORKING New Employee Placeholders - Available

JED data is updated nightly and can be reviewed throughout the budget season to identify changes to salary or staffing. See [Unit 6: Review JED Nightly Updates on Sheet and Report](#) for information on how to incorporate those nightly changes into the budgeting process.

Next, review the seeded salary.

If the employee's salary is not correct, update the 'pay rate' column. If individual merit increases will be budgeted, use the 'rate change' column to apply the correct percentage as indicated below:

Rate Change 1 = No change	Rate Change 5 = 5% increase starting in September
Rate Change 1.5 = 1.5% increase starting in September	Rate Change 6 = 6% increase starting in September
Rate Change 2 = 2% increase starting in September	Rate Change 7 = 7% increase starting in September
Rate Change 2.5 = 2.5% increase starting in September	Rate Change 8 = 8% increase starting in September
Rate Change 3 = 3% increase starting in September	Rate Change 9 = 9% increase starting in September
Rate Change 4 = 4% increase starting in September	Rate Change 10 = 10% increase starting in September

Verify if any **Additional Earnings** need to be added. To add additional earnings, see [Unit 4 – Page 10](#).

Compensation Type Item	Default Financial Account	Account Description	Per	Pay	Taxable
			Person	Based Benefits	Item Benefits
Base Pay	N/A	Various	Yes	Yes	Yes
Additional Pay - Auto	705500	S&W-Non-Benefit Eligible Staff	No	No	Yes
Additional Pay - Incentive Academic	708245	S&W-Incentive Pay Other	No	No	Yes
Additional Pay - Incentive MPIP	708400	&W-MPP Incentive Pay	No	No	Yes
Additional Pay - Incentive Staff	708425	S&W-Incentive Pay Other	No	No	Yes
Additional Pay - Moving Expense	715000	SB-Moving Expense	No	No	Yes
Additional Pay - Summer 9 mo	701000	S&W-Tenure/Tenure-Track Faculty	No	Yes	Yes
Additional Pay - Summer Academic	703500	S&W-Non-Ben Elg Faculty excl TNR	No	Yes	Yes
Additional Pay - SOM Call Pay	705500	S&W-Non-Benefit Eligible Staff	No	No	Yes
Additional Pay - SOM Other Clinical Comp	703800	Other Clinical Comp	No	No	Yes
Additional Pay - Other Academic	703800	S&W-Non-Ben Elg Acad (Non-Faculty)	No	No	Yes
Additional Pay - Other Staff	705500	S&W-Non-Benefit Eligible Staff	No	No	Yes
Additional Pay - Other	N/A	Various	No	No	Yes
Additional Pay - Pay Savings	N/A	Various	No	No	Yes

Review the '**Department and UM System FTE**'. FTE can be adjusted and changed throughout the year by adding additional rows & adjusting the start and end date if necessary.

EMPLOYEE	START DA...	END DATE	ASSIGN TY...	SALARY BASIS	# OF PAYMEN...▲	BENEFIT RATE	SYSTEM F...	DEPT FTE
	7/1/2024	7/31/20...	Full time	Monthly	1.00	UM Default	1.00000	1.00000
	7/1/2024	6/30/20...	Full time	Monthly	12.00	UM Default	1.00000	1.00000
	7/1/2024	6/30/20...	Full time	Monthly	12.00	UM Default	1.00000	1.00000
	7/1/2024	6/30/20...	Full time	Monthly	12.00	UM Default	1.00000	1.00000
	7/1/2024	6/30/20...	Full time	Monthly	12.00	UM Default	1.00000	0.10000

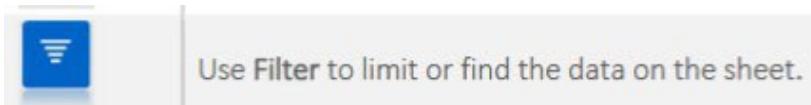
Review '**Benefits and Taxes**'. The computing of benefits and taxes for budgeting are controlled by the Yes/No on the 'PPB', 'PBB' and 'Taxes' columns.

EMPLOYEE	RATE CHANGE	PPB	PBB	LBR	TAXES
	Rate Change 1	No	No	No	No
	Rate Change 1	Yes	Yes	Yes	Yes
	Rate Change 1	Yes	Yes	Yes	Yes
	Rate Change 1	Yes	Yes	Yes	Yes
	Rate Change 1	Yes	Yes	Yes	Yes

Next review the chartfield allocations.

If any of the allocations need to be updated, adjust the 'level', 'fund', 'program', 'chartfield type' and 'chartfield value' columns.

*Best practice is to filter to the individual employee before making any changes:



To cancel the filter, use the 'Restore' button



*Only budget funds controlled by your Department.

If you are splitting a position with Hospital, add a second line for the employee using position number **P97000001 – Split-Paid Position**.

Leave the **Fund, Program, and Project** fields blank. This line does not feed other sheets but forces Workday to calculate the PPB rate correctly. Add a comment noting that this is a dummy line for benefit calculation only.

Position	Employee	Comp Type	Account	Rows	CSD_Attribute	DEPT_Attribute	Salary Basis	# of Payments	Benefit Rate	System FTE	Dept FTE	Budgeted Hr/Week	Pay Rate	Chartfield Type	Chartfield Value	Level	Fund	Program
P00070000	Davis,A	Base Pay	705000 - Br	2	CSUPSVCS	CSHARSVC	Hourly		26.00 UM Default	1.00000	0.10000	40.00	26.42 Percentage		10.0000	C1105109 - 0825 - Oth	0 - Unspec	
P97000001	Davis,A	Base Pay	705000 - Br	2	CSUPSVCS	CSHARSVC	Hourly		26.00 UM Default	1.00000	0.90000	40.00	26.42 Percentage		90.0000	C1105109		

All compensation appears on **Budget – Fin Plan Update** sheet & in the Workday reports immediately after the save button has been used.

Calculations

- Hourly Salary:** Hourly Pay Rate * # of weekly hours * 2 weeks in pay period * # of payments (*based on start and end dates and hourly pay dates*) * Chartfield % (*Defaults to 100% if amount is selected*) * Rate change value (*Rate change 1 is 1.00*).
- Monthly Salary:** Monthly Pay Rate * # of payments (*based on start and end dates*) * Chartfield % (*Defaults to 100% if amount is selected*) * FTE Rate (*Dept/System DPE*) * Rate change value (*Rate change 1 is 1.00*).
- Annual Salary:** Annual pay rate * Chartfield % (*Defaults to 100% if amount is selected*) * Rate change value (*Rate change 1 is 1.00*). Total annual salary will be split across begin and end dates.