

Compensation Planning

View the Compensation Planning Grid

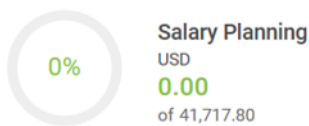
- From your Workday homepage, navigate to your **Workday inbox** and select the **Salary Planning: 2020 Compensation Planning** inbox item. The action item includes a Salary Planning grid where you will enter salary allocations. **If you manage exempt employees, you will also see an AIP Planning Tab** where you can enter discretionary AIP bonus allocations.

Note: Leaders with executives reporting to them will receive **two** inbox action items; both Compensation Planning tasks for executives and non-executives will need to be completed. Make sure to complete allocations on both the Salary Planning, and if applicable, AIP Planning tabs.

The screenshot shows the Workday interface. At the top, there is a search bar and navigation icons. Below is the 'Inbox' header. On the left, there are filters for 'Actions (3)' and 'Archive'. The main content area displays an action item titled 'Salary Planning: 2020 Compensation Planning for Operations Org (John Doe)'. This item includes an 'Organization Summary' for 'Salary Planning: 2020 Salary Planning' and an 'Overall Budget and Spend' section. The budget section features two progress wheels: 'Salary Planning USD 0.00 of 87,569.23' and 'AIP Planning USD 0.00 of 66,898.22', both showing 0% completion. Below this is a '% of Pool Summary' table with one row for 'Operations Org (John Doe)' showing 0.00% for both Salary and AIP Planning. At the bottom, there are 'Submit' and 'Search Employees' buttons.

- Your **Overall Budget and Spend** including the percent and dollar amounts allocated will appear at the top of the action item. This budget “wheel” will update automatically so you can track your progress against the total budget as you allocate dollars to employees.

Overall Budget and Spend

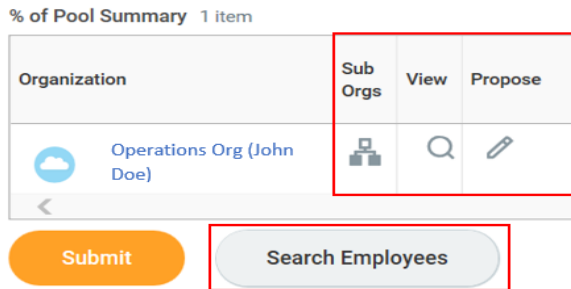


Overall Budget and Spend

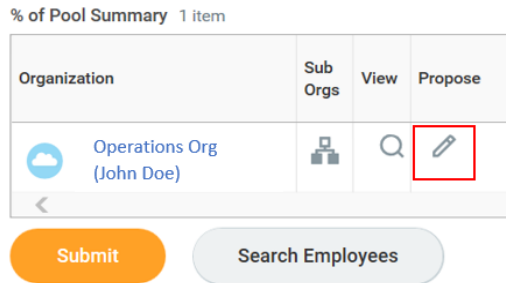


**IMPORTANT:** If you do not have subordinate organizations please skip to **Step 5**.

- If you have subordinate organizations, you will have the following options to view your organization or begin making allocations:
  - Sub Orgs** - Allows you to view and drill into all subordinate organizations, but you can only view one subordinate organization's grid at a time.
  - View or Search Employees** - Allows you to view specific employee data and filter it in various ways. In this method, you can view multiple employees across different organizations by a certain commonality (filter by job title, ladder level, manager, performance rating, etc.). Please note that you can only view 500 employees at a time.
  - Propose** - Allows you to enter salary increases, and if applicable, AIP allocations for your direct reports.



- Select the pencil icon under **Propose** to begin making allocations for your direct reports.



Navigate the Salary Planning and AIP Planning Tabs

- Adjust gridlines by hovering between columns and dragging the column. The Salary Planning and AIP Planning grids can also be downloaded as an Excel document using the Excel Workbook icon at the top of the page.

~Employee~	Job Title	Current Performance Rating	Prior Year Performance Rating	Warnings and Errors	Current Base Salary	Current / New Compa-Ratio	New Base Salary	Salary Planning Budget %	Salary Planning Increase %	Salary Planning Amount
Employee Name   ID # 000455	Operations Technician II	3.8	AA		\$61,000.00	0.921 - 0.921	\$61,000.00	3.25%	0.00%	0.00

- To filter data or sort by column, click on the column header and use the drop-down options to adjust.  
Note: The option to filter or sort on employee name is not available in the current Workday release.

~Employee~	Current Performance Rating	Prior Year Performance Rating	Warnings and Errors	Job Title	Current Base Salary	Current / New Compa-Ratio	New Base Salary	Salary Planning Budget %
Employee Name   ID # 000456	4.0			an III	\$78,500.00	0.980 - 0.980	\$78,500.00	3.25%
Employee Name   ID # 000457	3.0			an III	\$84,959.36	1.061 - 1.061	\$84,959.36	2.75%
Employee Name   ID # 000458	3.0			an II	\$60,944.45	0.921 - 0.921	\$60,944.45	2.75%
Employee Name   ID # 000459	3.1			an II	\$58,385.85	0.882 - 0.882	\$58,385.85	3.25%
Employee Name   ID # 000460	3.5			an II	\$66,904.13	1.011 - 1.011	\$66,904.13	3.25%

- You can view additional information for each employee by selecting the row of the employee you want to view. A **smart panel** will appear at the far right and displays important compensation and role information to help you with making salary increase, and if applicable, AIP recommendations.

**Current / New Compa-Ratio**  
1.075 - 1.075

**Min - Mid - Max**  
49,000 - 63,600 - 78,400

**Incentive Target**  
6.00%

**Last Pay Adjustment: Date-Amt**  
02/17/2018 - 2,655.35

**Ladder Level**  
B4

**Time in Job Profile**  
4 year(s), 11 month(s), 7 day(s)

**Full Time Equivalent %**  
100

## Allocate Budget Dollars

- To enter salary increases, enter a dollar amount in the **Salary Planning Amount** column **OR** enter a percent increase in the **Salary Planning Increase %** column. Recommendations should be made for all your direct reports.  
Note: Second level managers will review and approve allocations for indirect reports during Step 11.

~Employee~	Job Title	Current Performance Rating	Prior Year Performance Rating	Warnings and Errors	Current Base Salary	Current / New Compa-Ratio	New Base Salary	Salary Planning Budget %	Salary Planning Increase %	Salary Planning Amount
Employee Name   ID # 000461	Operations Technician II	3.8	AA		\$61,000.00	0.921 - 0.921	\$61,000.00	3.25%	<input type="text" value="3.25"/>	<input type="text" value="0.00"/>
Employee Name   ID # 000462	Operations Technician II	3.3	AA		\$64,333.82	0.972 - 0.972	\$64,333.82	2.75%	0.00%	0.00

9. If you also manage exempt employees, on the AIP Planning tab, enter a dollar amount in the **Total AIP Allocated \$** column.

~Employee~	Job Title	Current Performance Rating	Prior Year Performance Rating	Warnings and Errors	Target Opportunity %	Business Performance %	Individual Performance %	Total AIP Funded \$	Total AIP Allocated \$
Employee Name   ID # 000463	Supv Operations	3.4	AA		15.0%	100.0%	100%	\$8,546.45	<input type="text" value="0.00"/>
Employee Name   ID # 000464	Asset Integrity Specialist Sr	3.5	AA		12.5%	100.0%	105%	\$5,645.14	0.00

10. Review any warning and/or error messages that appear in the **Warnings and Errors** column.

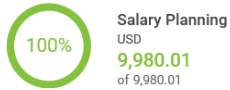
~Employee~	Job Title	Current Performance Rating	Prior Year Performance Rating	Warnings and Errors	New Base Salary	Salary Planning Budget %	Salary Planning Increase %	Salary Planning Amount	Warnings and Errors
Employee Name   ID # 000465	Operations Technician II	3.8	AA	1	\$59,780.00	3.25%	(2.00%)	(1,220.00)	ERROR: You have entered a negative merit amount. Merit values must be positive or \$0. Please review and remove this negative merit allocation.
Employee Name   ID # 000466	Operations Technician II	3.3	AA		\$64,333.82	2.75%	0.00%	0.00	WARNING: Employee has a salary planning increase of \$0. Please review to ensure this is correct.

- **Warnings** - Warnings **will not** prevent you from submitting your recommendations. Review the message to ensure the data entered is correct before proceeding.
- **Errors** - Errors **will** prevent you from submitting your recommendations. Review the message and correct the error indicated.

**Note:** If you have not made any salary increase or AIP allocations yet, **default warning messages for \$0 allocations** will display for all employees until you begin making your entries.

10. Once you have entered all salary and, if applicable, AIP recommendations review all warnings and correct any errors. Click the **Submit** button. Your budget should not exceed 100% unless you have approval by your manager to do so.

Overall Budget and Spend



16 items

		Salary Planning			AIP Planning					
~Employee~	Job Title	Current Performance Rating	Prior Year Performance Rating	Warnings and Errors	Current / New Compa-Ratio	New Base Salary	Salary Planning Budget %	Salary Planning Increase %	Salary Planning Amount	Warnings and Errors
Employee Name   ID # 000467	Operations Technician II	3.4	AAH		1.023 - 1.051	\$69,587.44	2.75%	2.75%	1,862.44	
Employee Name   ID # 000468	Operations Technician Lead	3.4	AA		0.886 - 0.915	\$88,839.58	3.25%	3.25%	2,796.40	

**Submit**

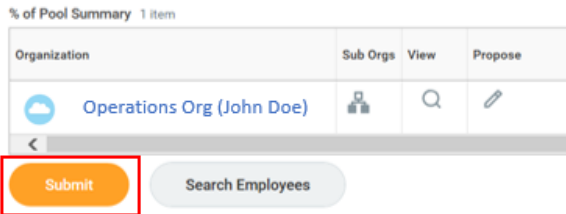
11. If you have subordinate organizations, first select **Continue** at the bottom of the screen.

~Employee~	Job Title	Current Performance Rating	Prior Year Performance Rating	Warnings and Errors	Current Base Salary	Current / New Compa-Ratio	New Base Salary	Salary Planning Budget %	Salary I
Employee Name   ID # 000469	Operations Technician II	3.4	AA		\$61,655.00	0.931 - 0.931	\$61,655.00	2.75%	
Employee Name   ID # 000470	Operations Technician I	3.0	AA		\$53,173.75	0.883 - 0.883	\$53,173.75	3.25%	
Employee Name   ID # 000471	Operations Technician II	3.0	AA		\$57,500.00	0.869 - 0.869	\$57,500.00	3.25%	
Employee Name   ID # 000472	Operations Technician I	3.0			\$51,500.00	0.855 - 0.855	\$51,500.00	0.00%	
Employee Name   ID # 000473	Operations Technician II	3.4	AA		\$58,410.00	0.882 - 0.882	\$58,410.00	3.25%	
Employee Name   ID # 000474	Operations Technician II	2.7	AA		\$58,410.00	0.882 - 0.882	\$58,410.00	3.25%	
Employee Name   ID # 000475	Operations Technician II	3.4	AA		\$67,404.24	1.018 - 1.018	\$67,404.24	2.75%	

**Continue**

12. Select **Submit** on the next page to submit for your overall organization.

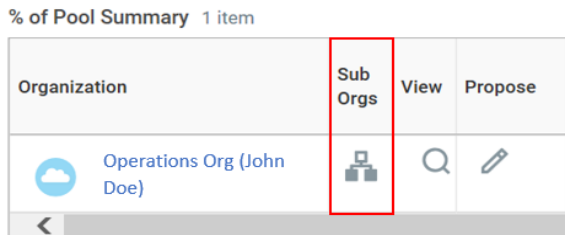
**IMPORTANT:** If you have supervisors reporting to you, you will have to wait until their subordinate organization's Salary Planning, and if applicable, AIP Planning grids have been submitted before you can submit your overall organization.



## Complete on Behalf (managers with subordinate organizations only)

If there are supervisors reporting to you that are not available during the Compensation Planning Process, you can enter salary, and if applicable, AIP recommendations for their organization via the **Complete on Behalf** functionality.

1. Select **Sub Orgs** on the main screen of your inbox action item for the manager's organization you wish to plan for.



**Note:** If at any time you need to go back to the top-level organization, you can select the back button in your browser or select **Return to Top Level** at the bottom of the screen.

Return to Top Level

2. Select the **Actions** drop-down from the **Actions Column** of the subordinate organization you would like to allocate or edit salary increases, and if applicable, AIP recommendations for.

Organization	View	Activity	Status	Positions	Salary Planning	AIP Planning	Actions
Operations Org (John Doe)			Awaiting Action	7	0.00%	0.00%	Actions
Operations Org - 2 (John Doe)			Awaiting Action	10	0.00%		Actions

3. Select **Complete on Behalf** from the drop-down menu.

Organization	View	Activity	Status	Positions	Salary Planning	AIP Planning	Actions
Operations Org (John Doe)			Awaiting Action	7	0.00%	0.00%	Actions
Operations Org -2 (James Smith)			Awaiting Action	10	0.00%		Actions
Operations Org -3 (Ryan Doe)			Awaiting Action	12	0.00%		View All Employees Search Employees Complete on Behalf
Operations Org -4 (Paul Doe)			Awaiting Action	9	0.00%		

4. Review the **Important Information** message, then select the check box next to **Confirm** and provide a brief description in the **Comment** section. Select **Complete on Behalf**.

1 item

Organization	Planner	Status	Employees
Operations Org -2 (James Smith)	James Smith	Awaiting Action	9

**Important Information** I understand this action will bring award planning up to my level so I may edit. All planners in subordinate organizations will be locked out as a consequence. After this action, I can only send back to the planner(s) directly below my organization.

**Confirm**

**Comment**

**Complete on Behalf**

5. Select **Done** on the next screen.

6. A **pencil icon** will now display instead of a magnifying glass in the **View** column. **Manually Advanced** will also display in the **Status** column. These indicate that you can now make edits to that subordinate organization's salary, and if applicable, AIP planning grids.

Organization	View	Activity	Status	Positions	Errors	Salary Planning	AIP Planning	Actions
Operations Org (John Doe)			Awaiting Action	7		0.00%	0.00%	Actions
Operations Org -2 (James Smith)			Manually Advanced	10	10	0.00%		Actions

7. To begin making allocations select the **pencil icon** under the view column.

- Once you have made all recommendations, you can either **Submit** the salary, and if applicable, AIP planning grids with your overall organization OR **Send Back** to the supervisor for review and/or additional edits.

**IMPORTANT:** You may choose to **Submit** with your overall organization rather than sending back if a supervisor is absent during the compensation planning process period. Before submitting for your overall organization at the top level, you will need to wait until all your subordinate organizations have submitted their Compensation Planning grids. Note: If you use the Send Back tool and the organization you are returning to the manager has a subordinate organization, all organizations for this org will only go back one level and any subordinate organizations will not return to the original manager.

If you need to send back to the supervisor for review, select **Actions** and then select **Send Back** from the drop-down.

Organization	View	Activity	Status	Positions	Errors	Salary Planning	AIP Planning	Actions
Operations Org (John Doe)			Awaiting Action	7		0.00%	0.00%	Actions
Operations Org -2 (James Smith)			Manually Advanced	10	▲ 10	0.00%		Actions
Operations Org -3 (Ryan Doe)			Awaiting Action	12		0.00%		View All Employees View Employees with Errors Search Employees Send Back
Operations Org -4 (Paul Doe)			Awaiting Action	9		0.00%		

- Provide a brief description in the **Comment** section and select **Send Back**.

1 item ☰ ☰

Organization	Planner	Status	Employees
Operations Org -2 (James Smith)	James Smith	Manually Advanced	9

Comment \* Write comment

Send Back
Cancel

- Select **Done** on the next screen.

- A **magnifying glass** will now display instead of a pencil icon in the **View** column and **Sent Back** will display in the **Status** column. These indicate that edits to the salary, and if applicable, AIP planning grids can now be made by the supervisor of that subordinate organization.

Organization	View	Activity	Status	Positions	Errors	Salary Planning	AIP Planning	Actions
Operations Org (John Doe)			Awaiting Action	7		0.00%	0.00%	Actions
Operations Org -2 (James Smith)			Sent Back	10	▲ 10	0.00%		Actions