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.

PEOPLEADMIN
A PowerSchool Company

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.

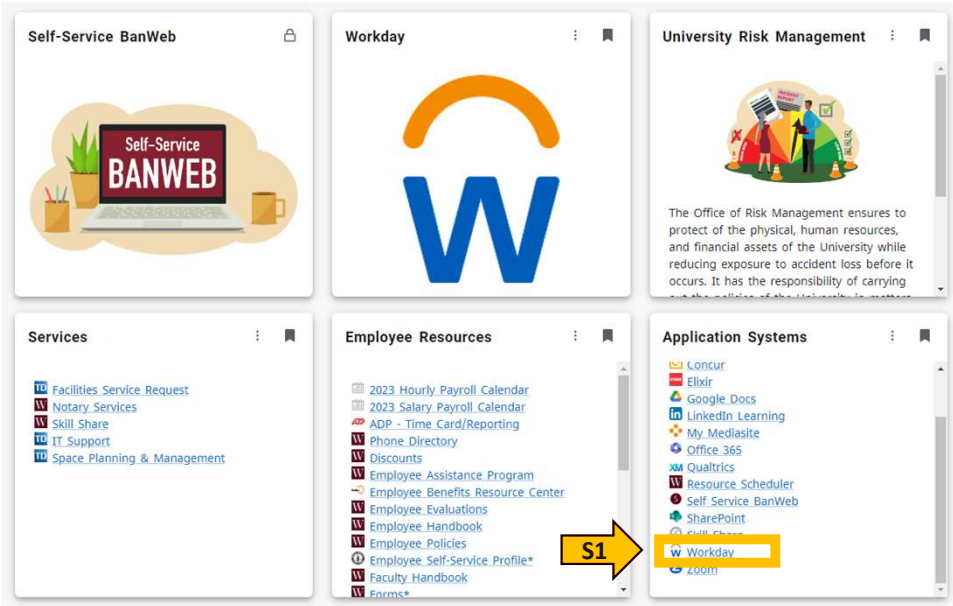
Reallocating the Budget

This is the time to make permanent across the board budget adjustments for FY26.

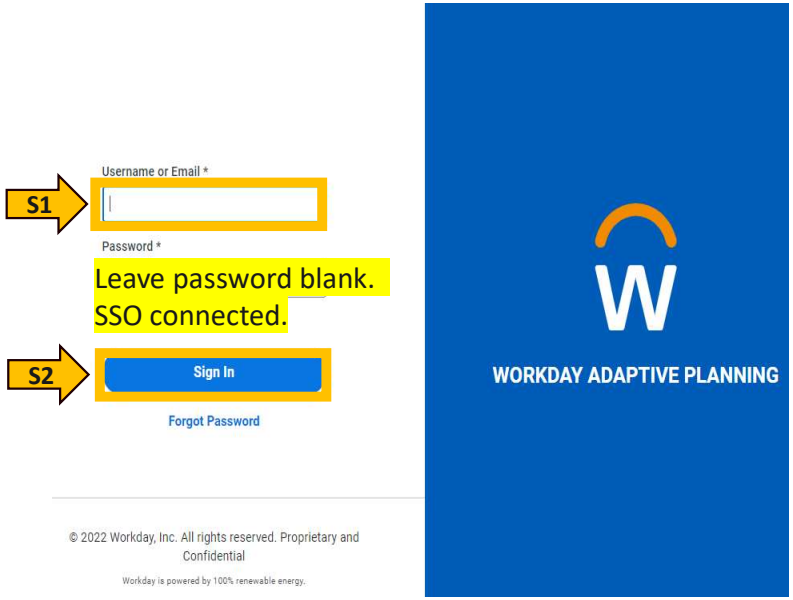
All accounts need to be adjusted based on historical spending patterns and anticipated expenditures.

Accessing Workday

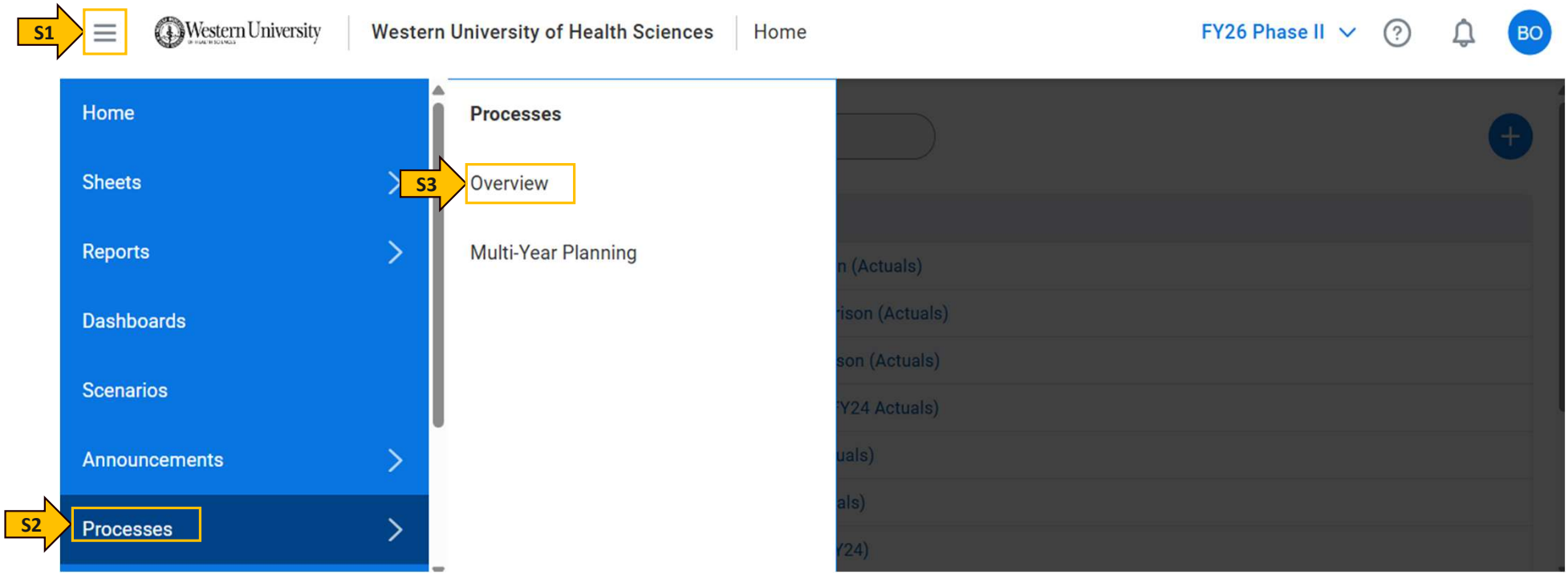
Via: https://my.westernu.edu/



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



Workday Overview – Accessing Processes Tasks

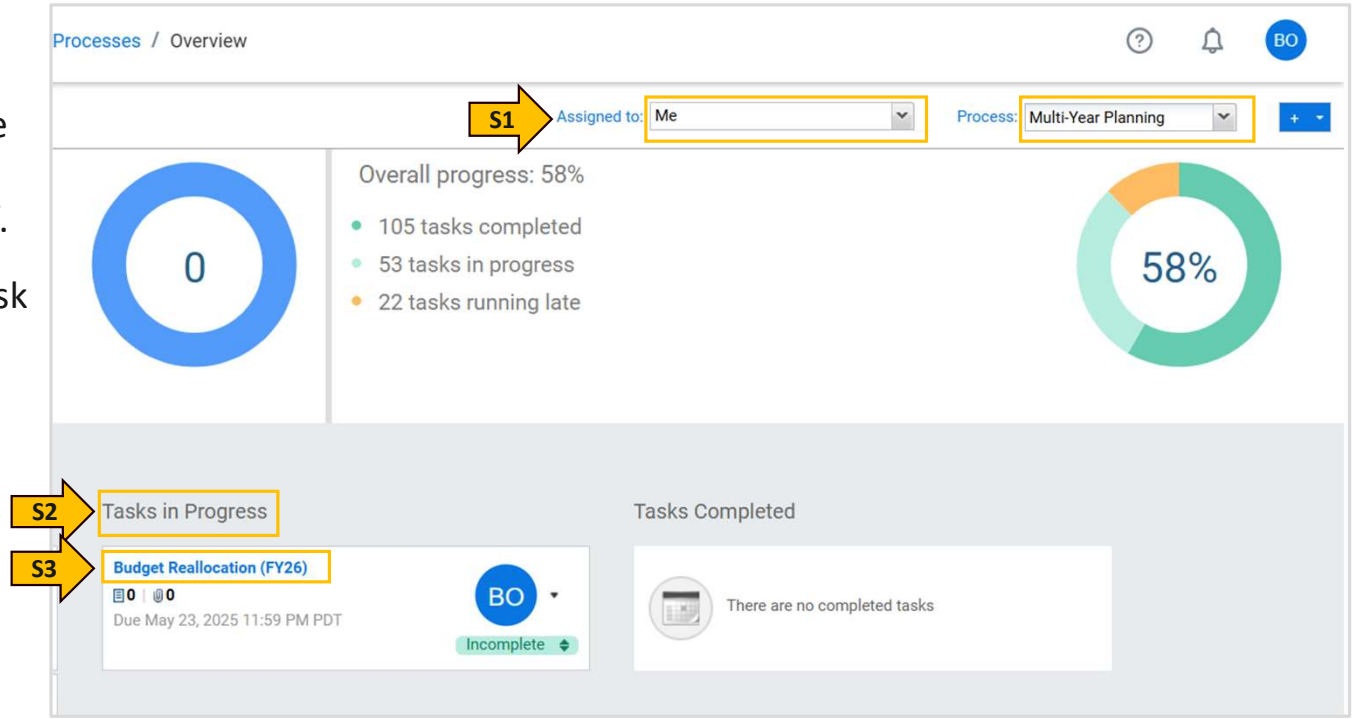


Workday Overview – Tasks Dashboard

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.

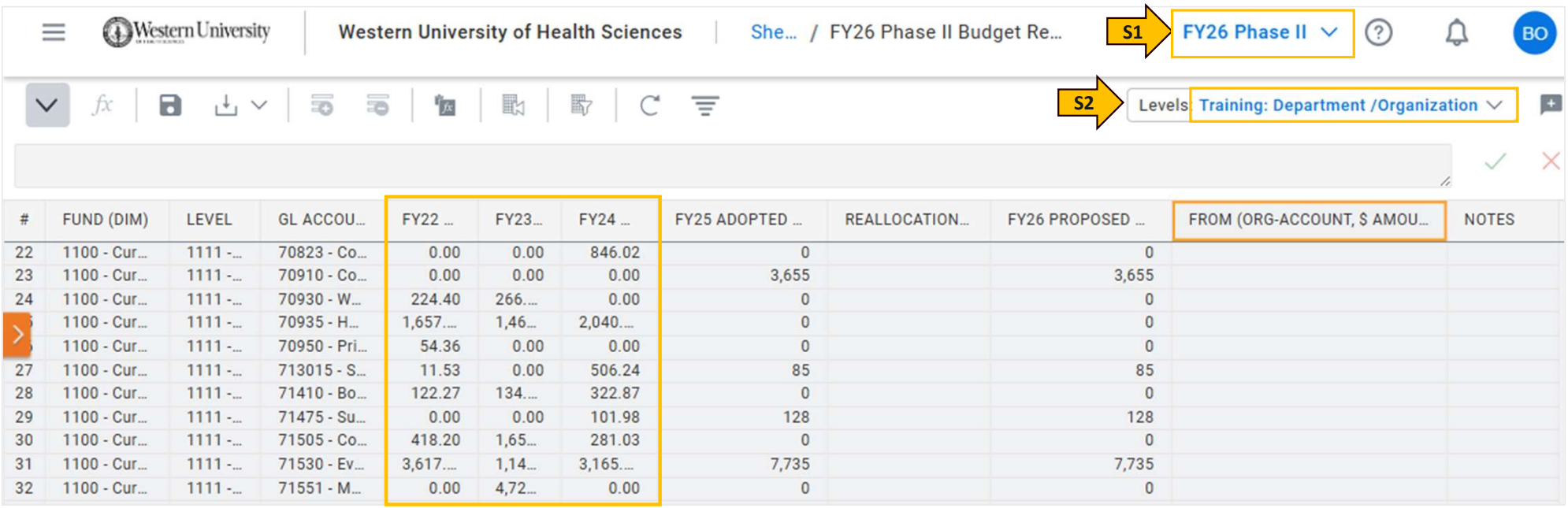
S3: To access each task, you will have to click on the title link, and it will take you directly to the sheet required to be completed.



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



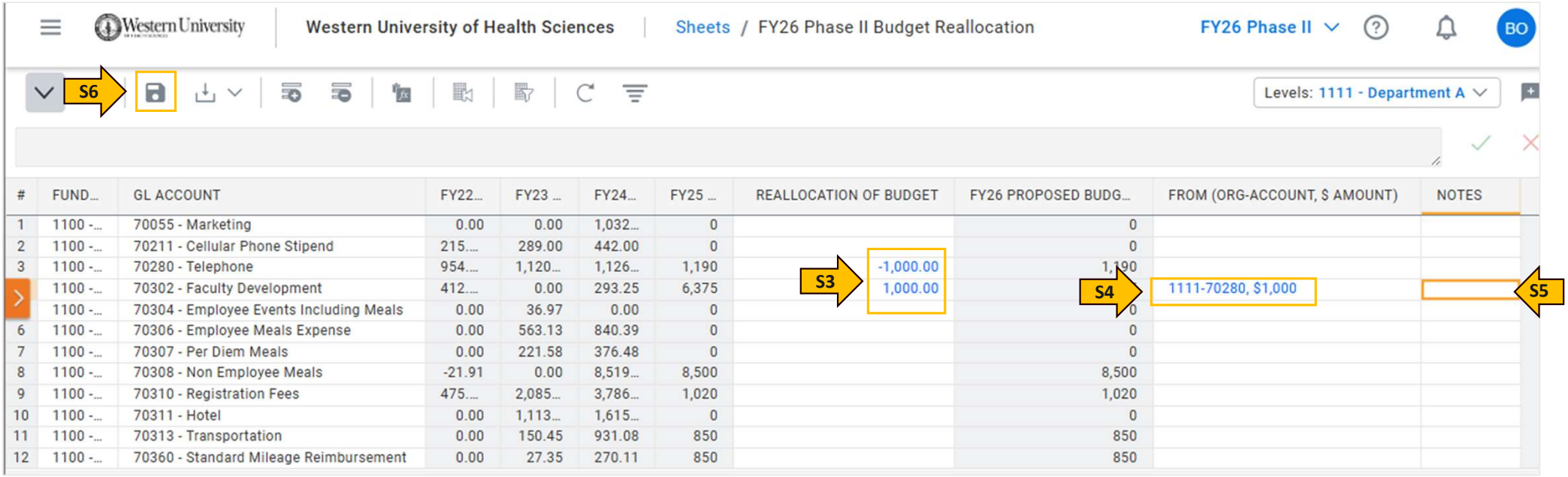
#	FUND (DIM)	LEVEL	GL ACCOU...	FY22 ...	FY23...	FY24 ...	FY25 ADOPTED ...	REALLOCATION...	FY26 PROPOSED ...	FROM (ORG-ACCOUNT, $ AMOU...	NOTES
22	1100 - Cur...	1111 -...	70823 - Co...	0.00	0.00	846.02	0		0		
23	1100 - Cur...	1111 -...	70910 - Co...	0.00	0.00	0.00	3,655		3,655		
24	1100 - Cur...	1111 -...	70930 - W...	224.40	266....	0.00	0		0		
[illegible]	1100 - Cur...	1111 -...	70935 - H...	1,657....	1,46...	2,040....	0		0		
[illegible]	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

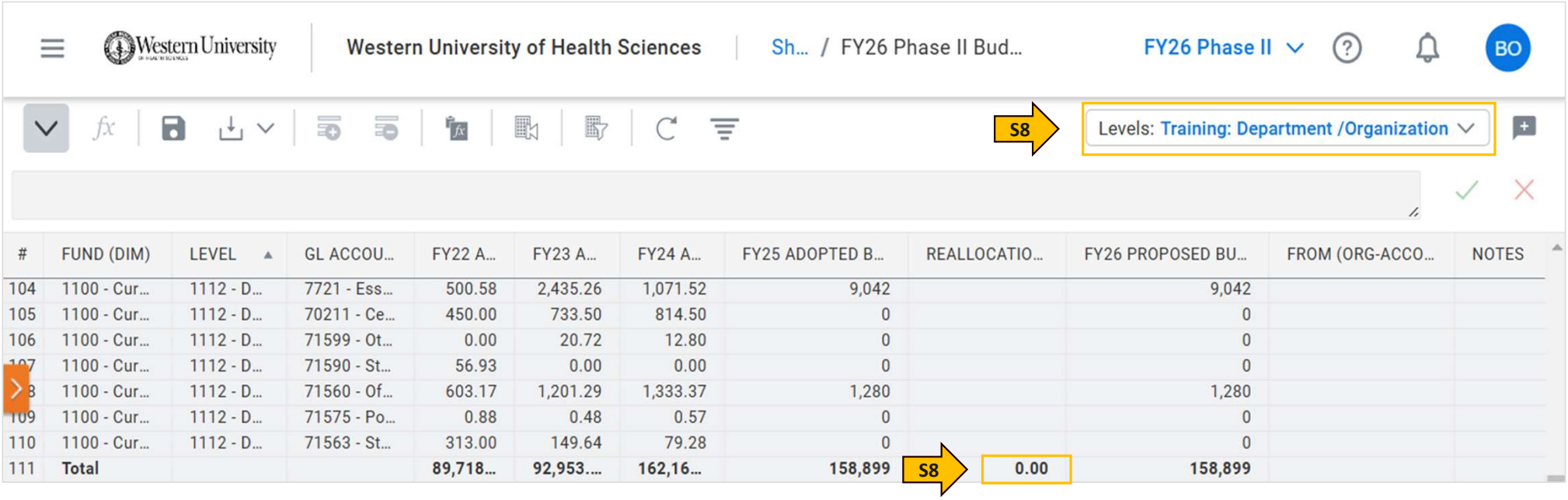
S3: Enter the increase/decrease (-) amount under the Reallocation of Budget column.
S4: When increasing budget, enter where funds are moving from and the amount in the FROM (ORG-ACCOUNT, $ Amount) column.
S5: Additional information can be provided under the Notes column.
S6: Click the Save icon to calculate 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	-1,000.00	1,190		
	1100 -...	70302 - Faculty Development	412....	0.00	293.25	6,375	1,000.00		1111-70280, $1,000	
	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

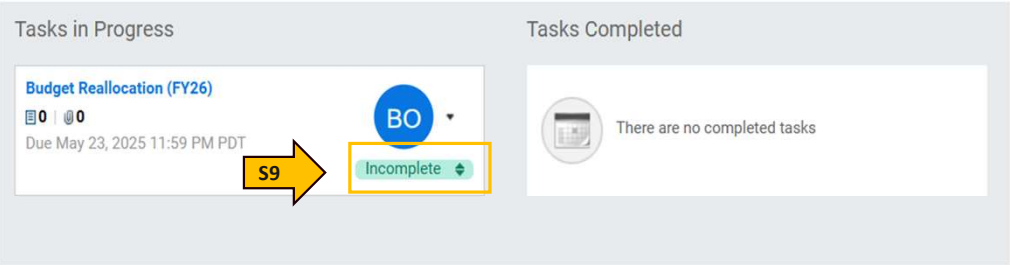
S8: For reallocation balancing, please make sure the highest rollup level is selected to ensure that the reallocation total is equal to Zero.

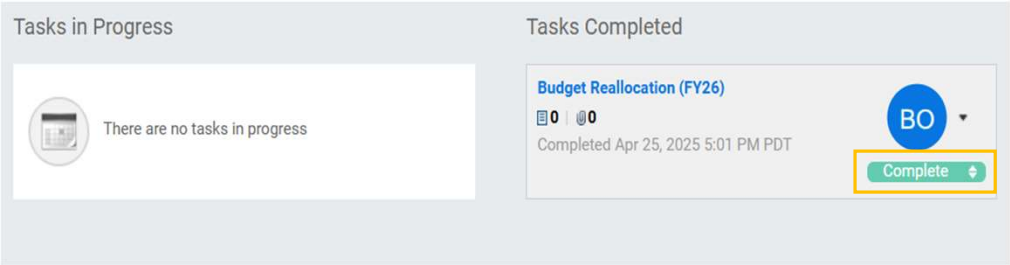


#	FUND (DIM)	LEVEL	GL ACCOU...	FY22 A...	FY23 A...	FY24 A...	FY25 ADOPTED B...	REALLOCATIO...	FY26 PROPOSED BU...	FROM (ORG-ACCO...	NOTES
104	1100 - Cur...	1112 - D...	7721 - Ess...	500.58	2,435.26	1,071.52	9,042		9,042		
105	1100 - Cur...	1112 - D...	70211 - Ce...	450.00	733.50	814.50	0		0		
106	1100 - 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.





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

Thank
you