



Welcome to the  
WesternU Family!  
Western University  
of Health Sciences

# FY27 Annual Salary Adjustment & Budget Development (Phase II)

Office of Human Resources and University Financial Services & Treasury

# Session Objectives

- ❖ Overview
- ❖ Salary Adjustment Process
- ❖ Budget Development Process Phase II
- ❖ Important Phase II Information and Dates
- ❖ Planning and Creating the FY2027 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 2.5%.

**Who:** Eligible, regular active employees of WesternU paid from the general operating budget who were hired prior to April 1, 2026, and did not receive another type of salary increase April 1, 2026, 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, 2026.

# PEOPLEADMIN (PA) Actions

**Grants and Contracts Positions:** Annual increases are based on the grant budget and may not fall on July 1<sup>st</sup>. Please contact Office of Sponsored Programs and Contract Management.

**Soft Funding Positions:** Please remember to submit PA Action Forms for any soft funding, increase eligible, positions by **noon** on **May 29, 2026**.

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

# PEOPLEADMIN (PA) Actions: Important Considerations

PA Actions with an effective date of July 1, 2026, will not be processed to accommodate for the processing of the annual salary adjustments.

PA Actions with an effective date of July 2, 2026, must be submitted by **noon** on **May 29, 2026**.

PA Actions submitted after July 2, 2026, with retroactive dates may not be approved.

For any increases submitted for July 2, 2026, the department will need to use the base pay budget including the 2.5%.

# Promotions

- All promotions must be submitted through PEOPLEADMIN.
- Promotions will be effective July 2, 2026.
- All promotions effective July 2, 2026, must be submitted no later than **noon** on **May 29, 2026**.
- Promotions effective after July 2, 2026, may be submitted throughout the year.



# Faculty Contracts

- PEOPLEADMIN (PA) Actions for faculty must be submitted by **noon** on Friday, **May 29, 2026**.
- PA Actions for faculty can have an effective date of July 1, 2026, to coincide with their faculty contract.
- Faculty contracts are due to the Office of the Provost on Monday, **June 1, 2026**.

For any questions regarding faculty contracts, please contact Allie Pawell at [apawell@westernu.edu](mailto:apawell@westernu.edu).

# Important Annual Salary Adjustment Information

- 2.5% 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 FY26 Budget and Historical Spending Trends
- Leverage Workday to Reallocate FY27 Operating and Capital Expenses
- Collaboratively Prepare and Balance FY27 Budget



# Planning and Creating the FY 2027 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 \(FY25\)](#)  [8. Budget Vs Actual \(FY26 YTD\)](#)
- 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 FY27 Budget Reallocation

- Provides easy to use ad hoc reporting for analysis.
- Simplifies the FY27 budget reallocation process by providing insights on historical spending patterns in one place.
- Provides the ability to view reallocated FY27 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 FY27. All accounts need to be adjusted based on historical spending patterns and anticipated expenditures.



\*Please note that additional funding, if any, will be communicated in May. This reallocation process is for your existing budget.

# Accessing Workday

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

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

The screenshot shows the Workday dashboard with a navigation bar at the top containing: Home, Community, Employee Services, Faculty Services, Financial Services, My Account, Reporting, Student Services, and a search icon with the text "VIEW ALL CARDS". The main content area is divided into several sections:

- Employee Self-Service:** Includes an image of people at computers and a button labeled "OPEN EMPLOYEE DASHBOARD" with the text "Quick access to HR and Payroll information."
- Services:** Lists links for Facilities Service Request, Asset Management Process, Notary Services, IT Support, and Space Planning & Management.
- Student & Employee Health:** Features an icon of a medical team and links for Student/Employee Health Office, Student/Employee Health Office Forms, and Contact Us.
- Employee Resources:** Lists various documents and programs such as 2026 Payroll Calendar, ADP - Time Card/Reporting, Phone Directory, Discounts, Employee Assistance Program, Employee Evaluations, Employee Relations Assessment, Employee Self-Service Profile\*, Employee Handbook, Faculty Handbook, Forms, and HR Employee Complaint & Resolution Process.
- Application Systems:** Lists external services like Cognos\*, Concur, Elixir, Google Docs, LinkedIn Learning, Lucidchart, My Mediasite, Office 365, Qualtrics, and Resource Scheduler. A yellow box highlights the Workday icon, with an arrow labeled "S1" pointing to it.
- To-Do List:** Includes a checkmark icon and the text "Add your tasks" and "Create personal tasks and reminders." with an "ADD NEW TASK" button.
- Bookmarks:** Includes a link icon and the text "Add quick links" and "Create links to your most important pages." with an "ADD NEW LINK" button.

The screenshot shows the Workday login page. On the right is a blue vertical banner with the Workday logo (a stylized 'W' with an orange arc above it) and the text "WORKDAY ADAPTIVE PLANNING". The main white area contains the login form:

- A text input field for "Username or Email \*" with a yellow box around it and an arrow labeled "S1" pointing to it.
- A text input field for "Password \*". A yellow box highlights this field with the text "Leave password blank. SSO connected.".
- A blue "Sign In" button with a yellow box around it and an arrow labeled "S2" pointing to it.
- A link for "Forgot Password" below the sign in button.
- At the bottom, there is a copyright notice: "© 2022 Workday, Inc. All rights reserved. Proprietary and Confidential" and a small note: "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. The top navigation bar includes the university logo, the name 'Western University of Health Sciences', and the 'Home' link. On the right side of the top bar, there is a dropdown menu for 'FY27 Phase II', a help icon, a notification bell, and a user profile icon labeled 'BO'. A primary navigation menu is open on the left side, listing options: Home, Sheets, Reports, Dashboards, Scenarios, Announcements, and Processes. The 'Processes' option is highlighted with a yellow arrow labeled 'S2'. A secondary navigation menu is open under 'Processes', listing 'Overview' and 'Multi-Year Planning'. The 'Overview' option is highlighted with a yellow arrow labeled 'S3'. The main content area shows a table with columns for 'Output' and 'Location', and an 'Add New' button in the top right corner. The table contains several rows of data, including entries like 'n (Actuals)', 'ison (Actuals)', 'son (Actuals)', 'Y25 Actuals)', 'uals)', 'ais)', and 'Y25)'. Each row lists 'HTML' as the output type and 'Shared' as the location.

Output	Location
n (Actuals)	Shared
ison (Actuals)	Shared
son (Actuals)	Shared
Y25 Actuals)	Shared
uals)	Shared
ais)	Shared
Y25)	Shared

# 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 shows the 'Processes / Overview' page for 'Sciences'. At the top, there are navigation links for 'Sciences' and 'Processes / Overview', along with help, notification, and user profile icons. Below this, there are two dropdown menus: 'Assigned to: Me' and 'Process: Multi-Year Planning', both highlighted with yellow boxes and labeled 'S1'. A large blue circle on the left contains the number '0'. To the right, a summary section shows 'Overall progress: 0%' and a list of task statuses: '0 tasks completed', '46 tasks in progress', and '9 tasks running late'. A donut chart on the right also shows '0%'. Below the summary, there are two main sections: 'Tasks in Progress' and 'Tasks Completed'. The 'Tasks in Progress' section is highlighted with a yellow box and labeled 'S2'. It contains a task card for 'Budget Reallocation (FY27)' with a due date of 'May 29, 2026 11:59 PM PDT' and a status of 'Incomplete'. The 'Tasks Completed' section is labeled 'S3' and shows '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 FY27 Phase II    **S2:** Select ORG to view and reallocate funds

#	FUND (DIM)	LEVEL	GL ACCOU...	FY23 ...	FY24 ...	FY25 ...	FY26 ADOPTED BUDG...	REALLOCATIO...	FY27 PROPOSED...	FROM (ORG-ACCOUNT, \$ AMOU...	NOTES
33	1100 - Cur...	1111 - ...	70950 - Pr...	5,153....	312.74	115.76	7,300		7,300		
34	1100 - Cur...	1111 - ...	70823 - Co...	0.00	1,226....	9,040...	790,000		790,000		
35	1100 - Cur...	1111 - ...	70300 - Co...	0.00	0.00	400.00	0		0		
>	1100 - Cur...	1112 - ...	70304 - E...	6,148....	12,44...	42,77...	0		0		
	1100 - Cur...	1112 - ...	70306 - E...	58,579...	99,04...	47,36...	66,500		66,500		
38	1100 - Cur...	1112 - ...	70307 - Pe...	1,027....	494.53	12,78...	18,000		18,000		
39	1100 - Cur...	1112 - ...	70308 - N...	793.55	1,054....	101,3...	3,500		3,500		
40	1100 - Cur...	1112 - ...	70310 - Re...	30.00	1,140....	185.00	20,300		20,300		
41	1100 - Cur...	1112 - ...	70311 - H...	69,705...	87,24...	52,16...	40,000		40,000		
42	1100 - Cur...	1112 - ...	70312 - In...	6.00	0.00	1,168...	1,500		1,500		
43	1100 - Cur...	1112 - ...	70313 - Tr...	69,174...	68,32...	82,73...	78,000		78,000		

**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.

Western University | Western University of Health Sciences | Shee... / FY27 Phase II Budget Realloca... | FY27 Phase II

fx Levels: 1111 - Department A

#	FUND (...)	GL ACCOUNT	FY23 ...	FY24...	FY25 ...	FY26 ...	REALLOCATION OF BUDGET	FY27 PROPOSED BUDG...	FROM (ORG-ACCOUNT, \$ AMOUNT)	NOTES
28	1100 - ...	79200 - Equipment-Computers	0.00	19,8...	0.00	0		0		
29	1100 - ...	79208 - Equipment-Audio Visual	0.00	0.00	5,781....	350,000		350,000		
	1100 - ...	70010 - Promotion	12.99	6,49...	8,185....	15,798	S3 → -1,000.00	15,798	S4 → 1111-70010, \$1,000	S5 →
	1100 - ...	70040 - Organizational Sponsor...	10,00...	12,8...	6,990....	32,435	1,000.00			
32	1100 - ...	70305 - Donor Entertainment	1,843....	52.00	5,148....	0		0		
33	1100 - ...	70950 - Printing	5,153....	312....	115.76	7,300		7,300		
34	1100 - ...	70823 - Commencement	0.00	1,22...	9,040....	790,000		790,000		
35	1100 - ...	70300 - Continuing Education	0.00	0.00	400.00	0		0		

Showing rows 1-35 of 35.

# 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.

Western University | Western University of Health Sciences | Sheets / FY27 Phase II Budget Reallocation | FY27 Phase II

Levels: Training: Department / Organization

#	FUND (...)	LEVEL	GL AC...	FY23...	FY24 ...	FY25 ...	FY26 ADOPTED BUDG...	REALLOCATION OF BUDGET	FY27 PROPOSED BUD...▲	FROM (ORG-ACCOUNT, ...)	NOTES
73	1100 - ...	1111 - Department A	7030...	5,00...	0.00	10,440...	35,000		35,000		
74	1100 - ...	1112 - Department B	7031...	69,7...	87,248...	52,161...	40,000		40,000		
75	1100 - ...	1111 - Department A	7031...	21,7...	544.04	15,679...	45,000		45,000		
76	1100 - ...	1112 - Department B	7030...	0.00	0.00	0.00	50,000		50,000		
>	1100 - ...	1111 - Department A	7091...	139,...	22,338...	302,06...	58,000		58,000		
	1100 - ...	1112 - Department B	7030...	58,5...	99,047...	47,361...	66,500		66,500		
79	1100 - ...	1112 - Department B	7031...	69,1...	68,329...	82,730...	78,000		78,000		
80	1100 - ...	1111 - Department A	7091...	7,10...	0.00	310,76...	108,850		108,850		
81	1100 - ...	1111 - Department A	7920...	0.00	0.00	5,781...	350,000		350,000		
82	1100 - ...	1111 - Department A	7082...	0.00	1,226...	9,040...	790,000		790,000		
83	<b>Total</b>			<b>7,67...</b>	<b>741,4...</b>	<b>1,423,...</b>	<b>1,875,133</b>	<b>S8</b>	<b>0.00</b>	<b>1,875,133</b>	

# 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 displays four panels in a row, illustrating the process of completing a task. The first panel, titled 'Tasks in Progress', shows a task card for 'Budget Reallocation (FY27)' with a due date of 'May 29, 2026 11:59 PM PDT'. A yellow arrow labeled 'S9' points to the 'Incomplete' status button, which is highlighted with a yellow box. The second panel, titled 'Tasks Completed', shows a message: 'There are no completed tasks'. The third panel, titled 'Tasks in Progress', shows a message: 'There are no tasks in progress'. The fourth panel, titled 'Tasks Completed', shows the same task card, but now with a completion date of 'Apr 30, 2026 4:05 PM PDT' and the 'Complete' status button highlighted with a yellow box.

# Important Phase II Information and Dates

- Complete FY27 Workday Financial Coordinator Authorization Form if any changes are required
- Reallocate Budget Using FY27 Phase II Version, in Workday Adaptive Insights
- Ensure “Budget Reallocation (FY27)” Process Task is Completed in Workday
- Budget Development Phase II Deadline: **May 29, 2026**



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

# Additional Sessions & Resources

## **Open Q&A Sessions Will be Available (Zoom):**

- May 12, 2026 at 2pm (HR & Budget)
- May 19, 2026 at 3pm (Budget)
- May 26, 2026 at 2pm (HR & Budget)
- May 28, 2026 at 11:30am (Budget)

\*Zoom link will be provided following this session.

# Contact Information


## Annual Salary Adjustment Questions:

 Contact: Office of Human Resources  
Email: [HR@westernu.edu](mailto:HR@westernu.edu)

## PEOPLEADMIN Questions:

 Contact: Human Resources Operations  
Email: [HROperations@westernu.edu](mailto:HROperations@westernu.edu)

## Faculty Contract Questions:

 Contact: Allie Pawell, Senior Director of Operations for Provost's Office  
Email: [apawell@westernu.edu](mailto:apawell@westernu.edu)

## Budget Development Questions:

 Contact: Office of Budget Administration  
Email: [Budget@westernu.edu](mailto:Budget@westernu.edu)

# Budget Development Questions and Answers



