Friday, Nov. 4 at 4:00 p.m., Albaugh Family Plaza

• **Breaking Barriers** dedication

• Recognize naming of Jack Trice Way
  (S. 4th St. in front of the stadium)

• City of Ames Proclamation

• JackTrice100.com
Homecoming Kickoff Celebration
11:00 AM to 2:00 PM / Commuter parking lots (A-2 and A-3; east of ISU Alumni Center)

ExCYtement in the Streets
4:30 PM to 6:30 PM / South of campus (between Ash Avenue and Gray Avenue)

Honors and Awards Celebration
1:30 PM / CY Stephen's Auditorium

Homecoming Celebration and Pep Rally
5:00 PM to 9:00 PM / ISU Alumni Center (429 Alumni Lane)
NEW TELECOUNSELING AVAILABLE FOR ALL STUDENTS

WE KNOW STUDENTS ARE BUSY. LET US MEET YOU WHERE YOU ARE.

Iowa State University is providing FREE Telecounseling Services for Students in addition to the services provided on campus at Student Counseling Services.
Leadership Searches

Vice President for Extension and Outreach
• 5 finalists
• First finalist to visit campus on Oct. 27
• Full schedule available on Provost’s Office search page

Senior Vice President for Operations and Finance
• 2 finalists
• First finalist to visit campus on Oct. 31
• Finalizing schedule for other finalist
• Full schedule will be posted on the President’s Office search page
Workday Update
President's Council

October 26, 2022
Agenda

- Workday Implementation Timeline
- Training Timeline
- Engaging with campus
  - Readiness Workshops
- Example of a Change Impact
- Questions
## Workday Student & Receivables Timeline

<table>
<thead>
<tr>
<th>MTP1: June 2023 – Feb 2024</th>
<th>Fall 2024 New Applicants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building ISU <strong>Academic Foundation</strong> (university hierarchy), <strong>Curriculum Management</strong> (course offerings, rules and requirements), <strong>Student Core</strong> (personal profile), and creating processes related to <strong>Recruiting and Admissions</strong> for new applicants.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>MTP2: March 2024 – Nov 2024</th>
<th>New &amp; Continuing Students + Customer Accounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configuring processes related to <strong>Academic Advising</strong> (academic progress reports), <strong>Student Records</strong> (course registration, transcripts, graduation), <strong>Financial Aid</strong> (packaging and disbursing aid, R2T4), <strong>Student Financials</strong> (student billing charges, payments and balances), and <strong>Customer Accounts</strong> (non-student billing charges, payments and balances)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>December 2024 and Beyond</th>
<th>Stabilization &amp; Continuous Improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ongoing effort to enhance new and existing Workday processes, tools, and training materials.</td>
<td></td>
</tr>
</tbody>
</table>
## WorkCyte Phase II Training Timeline

<table>
<thead>
<tr>
<th>First Use 1: Live June 2023</th>
<th>First Use 2: Live Oct. 2023 - Jan. 2024</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Foundation</td>
<td>Curriculum Management</td>
</tr>
<tr>
<td>Curriculum Management I</td>
<td>Financial Aid II</td>
</tr>
<tr>
<td>Financial Aid I</td>
<td>Student Financials II</td>
</tr>
<tr>
<td>HCM</td>
<td></td>
</tr>
<tr>
<td>Recruiting &amp; Admissions</td>
<td></td>
</tr>
<tr>
<td>Student Core</td>
<td></td>
</tr>
<tr>
<td>Student Financials I</td>
<td></td>
</tr>
<tr>
<td>Security/Integrations/ Reports for MTP1</td>
<td>Training Launch: August – February 2024</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>First Use 3: Live March - June 2024</th>
<th>First Use 4 – 6: Live July - November 2024</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Advising</td>
<td>Finance Customer Accounts</td>
</tr>
<tr>
<td>Financial Aid III</td>
<td>Financial Aid IV</td>
</tr>
<tr>
<td>Student Records</td>
<td>Student Financials</td>
</tr>
<tr>
<td>Security/Integrations/ Reports for MTP2</td>
<td>Student Records</td>
</tr>
<tr>
<td>Training Launch: January – July 2024</td>
<td>Training Launch: May – December 2024</td>
</tr>
</tbody>
</table>
Readiness Workshops

• A webinar series to prepare the ISU Community for **coming changes** related to Workday Student implementation

• **Goals** of readiness workshops:
  • Assist campus to **anticipate** and **prepare** for change in:
    • Workflows
    • Business processes
    • Policies

• Publicized via:
  • Inside Iowa State
  • WorkCyte Digest
  • WorkCyte website
  • Targeted invitations to impacted ISU stakeholders

**Readiness Workshop:**
**A First Look at Recruiting and Admissions**

November 9, 2022
3:10 - 4:00 p.m.
Example of a Change Impact: Course & Course Section Components
Decentralized Course Data

- Course Leaf
- U. Achieve
- CIM
- CIMX
- University Catalog
- ADIN
- Schedule of Classes
Centralized Course Data

Workday
## Change Impacts for Courses and Course Sections

<table>
<thead>
<tr>
<th><strong>Faculty and Administrators</strong></th>
<th><strong>Students</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• No character limits on course titles or descriptions</td>
<td>• Greater student visibility to course section information in real-time:</td>
</tr>
<tr>
<td>• Ability to <strong>enforce course prerequisites</strong> at the time of registration</td>
<td>- Capacity</td>
</tr>
<tr>
<td>• <strong>Reserved Seating</strong> enables fewer course sections and expands criteria for holding section seats</td>
<td>- Fees</td>
</tr>
<tr>
<td>• <strong>Experimental courses</strong> will be listed in the catalog</td>
<td>- Instructor</td>
</tr>
<tr>
<td>• <strong>Course tags</strong> will facilitate search, reporting, and planning for courses</td>
<td>- Time</td>
</tr>
<tr>
<td>• <strong>Real-time data is readily available</strong> to users on catalog and section data for reporting</td>
<td>- Prerequisites</td>
</tr>
<tr>
<td></td>
<td>• <strong>Increased search functionality</strong> for students during registration</td>
</tr>
<tr>
<td></td>
<td>• <strong>One system</strong> for courses, sections, registrations, academic plans, and schedules</td>
</tr>
<tr>
<td></td>
<td>• <strong>Overrides for course prerequisites</strong> will be available through request or administrative action</td>
</tr>
</tbody>
</table>
Supplemental Resources

• **WorkCyte Website**
  - [Change Impacts](#)
  - [Readiness Workshop registration](#)
  - [WorkCyte Digest](#)
    - Monthly newsletter for the latest Workday updates
    - Next edition publishes November 9, 2022

• Email [WorkCyte_Feedback@iastate.edu](mailto:WorkCyte_Feedback@iastate.edu)
Join Us Next Month

Readiness Workshop:
A First Look at Recruiting and Admissions

November 9, 2022
3:10 - 4:00 p.m.

Share Feedback With Us!
workcyte_feedback@iastate.edu

Readiness Workshop Registration
https://go.iastate.edu/JY8NOY
First Use 1 Training Launch
- Admissions Graduate College Evaluator
- Admissions Graduate Final Evaluator
- Admissions Undergraduate Office Evaluator
- A/R Accounting Specialist
- College Records Manager
- Controller’s Office
- Cost Center Manager
- Department Partner
- Department and College Curriculum Approver
- Honors Administrator
- Recruiting & Admissions Engagement Administrator or Approver
- Student Financials Administrator, Manager, or Specialist

First Use 1 Live
Academic Foundation, Curriculum Management, HCM, Recruiting & Admissions, Student Core, Student Financials

First Use 2 Training Launch
- College Records Manager
- Core Scholarship Unit
- Curriculum Management Administrator
- Department Partner
- Director of Enrollment Research & Analytics
- FA Advisor, Administrator, or Officer
- FA Calculations Manager
- FA Data and Research & FA Report Writer
- FA Verification Specialist
- FA Verification Student Assistant Reviewer or Evaluator
- Graduate College Partner
- Registrar’s Office
- Room Scheduling Manager
- FA Data and Research & FA Report Writer
- Student FA Vet Med Specialist
- Student Financials Administrator, Auditor, or Specialist
- Undergraduate Admissions Office Evaluator

First Use 2 Live
Curriculum Management, Financial Aid, Student Financials
First Use 1: June 2023

**Curriculum Management**
- Department Partner
- College Records Manager
- Department and College Curriculum Approver

  Managing Courses and Prerequisites:
  Managing courses and prerequisites; requesting and editing prerequisites
  Editing course, collecting information from faculty members and departments, entering information into WD, and routing for approval
  Reviewing data and managing approvals (delegation)

**Recruiting & Admissions**
- Recruiting and Admissions Engagement Administrator
- Student Recruiting Engagement Approver

  Managing Engagements:
  Navigating student notes, viewing related activities happening outside of WD, and connecting Salesforce activity back to WD

- Admissions Undergraduate Office Evaluator

  Evaluating Undergraduate Applications:
  Understanding undergraduate domestic, international, and non-degree application processes
  Reviewing undergraduate admissions files and rendering decisions

- Admissions Graduate Office Evaluator
- Admissions Graduate College Evaluator
- Admissions Graduate Final Evaluator (DOGE)

  Evaluating Graduate Applications:
  Understanding graduate domestic, international, and non-degree application processes
  Reviewing graduate admissions files and rendering decisions

- Honors Administrator

  Managing Honors Applications:
  Processing Honors applications and assigning application cohorts based on status (invited, applied, offered, denied, declined, waitlist, etc.)

**Student Financials**
- A/R Accounting Specialist
- Cost Center Manager
- Controller’s Office

  Managing Application Fees:
  Posting student application fees to finance

- Student Financials Administrator, Manager, or Specialist
- Controller’s Office
- Cost Center Manager

  Managing Undergraduate Admissions Acceptance Fees:
  Posting undergraduate acceptance payments and charges for Orientation, New Student Programs, and ALEKS Math Assessment

*Disclaimer: These examples do not represent a comprehensive list of planned training topics or roles.*
First Use 2: October 2023

**Curriculum Management**
- Department Partner
- Curriculum Management Administrator
- Room Scheduling Manager
- College Records Manager

**Managing Course Sections:**
Understanding course section data, creation, editing courses (two processes), reporting tools, and reserved seating

- Curriculum Management Administrator

**Managing Course Section Roll:**
Rolling and creating course sections for greater campus use

**Financial Aid**
- FA Calculations Manager
- FA Advisor, Administrator, or Officer
- Director of Enrollment Research & Analytics
- FA Data and Research & FA Report Writer

**Cost of Attendance:**
Understanding cost of attendance assignments to update calculations

- Core Scholarship Unit
- Undergraduate Admissions Office Evaluator

**Scholarships:**
Creating award items and using custom fields for calculations

**Graduate College Partner**
**Assistantships and Fellowships:**
- Making a determination of awards/ recipients and entering awards determined

- FA Verification Student Assistant Reviewer or Evaluator
- FA Verification Specialist
- FA Data and Research & FA Report Writer

**Student Financials**
- Student Financials Administrator, Auditor, or Specialist
- Registrar’s Office

**Managing Course Fee Assessment**
Creating and configuring Student Charge Items, building calculations if necessary, and attaching charge items and the course fee amounts to student courses or course sections

**Student Financials**
- Core Scholarship Unit
- Undergraduate Admissions Office Evaluator

**Scholarships:**
Creating award items and using custom fields for calculations

**Graduate College Partner**
**Assistantships and Fellowships:**
- Making a determination of awards/ recipients and entering awards determined

- FA Verification Student Assistant Reviewer or Evaluator
- FA Verification Specialist
- FA Data and Research & FA Report Writer

**FA Federal Verification:**
- Processing action items supporting federal verification

*Disclaimer: These examples do not represent a comprehensive list of planned training topics or roles.*
## Change Impacts as of October 11, 2022

<table>
<thead>
<tr>
<th>Impacted</th>
<th>Total: 355</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruiting &amp; Admissions</td>
<td>62</td>
</tr>
<tr>
<td>Student Financials</td>
<td>47</td>
</tr>
<tr>
<td>Academic Advising</td>
<td>44</td>
</tr>
<tr>
<td>Curriculum Management</td>
<td>38</td>
</tr>
<tr>
<td>Student Records</td>
<td>38</td>
</tr>
<tr>
<td>Financial Aid</td>
<td>34</td>
</tr>
<tr>
<td>Student Core</td>
<td>24</td>
</tr>
<tr>
<td>Cross Functional</td>
<td>23</td>
</tr>
<tr>
<td>Customer Accounts</td>
<td>15</td>
</tr>
<tr>
<td>Academic Foundation</td>
<td>11</td>
</tr>
<tr>
<td>Graduate</td>
<td>8</td>
</tr>
<tr>
<td>Reporting &amp; Analytics</td>
<td>5</td>
</tr>
<tr>
<td>Non-Student Receivables</td>
<td>4</td>
</tr>
<tr>
<td>Human Capital Management</td>
<td>1</td>
</tr>
<tr>
<td>Tech-Security</td>
<td>1</td>
</tr>
</tbody>
</table>
ISU Employee Benefits Overview

President’s Council
October 26, 2022
<table>
<thead>
<tr>
<th>Medical monthly total premium increasing</th>
<th>Dental monthly total premium increasing</th>
<th>Medical and pharmacy plan design: no changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dental plan design: no changes</td>
<td>Vision: lens benefit improved while premiums have not changed</td>
<td>Medical Flexible Spending Account (FSA) annual maximum increasing to $3,050</td>
</tr>
<tr>
<td>Medical FSA carryover limit increasing to $610</td>
<td>NEW Option: Debit cards for flex reimbursement</td>
<td>Dependent verification</td>
</tr>
</tbody>
</table>

The contribution limit for employees who participate in the 403(b), and 457(b) plans, and the federal government's Thrift Savings Plan is increased to $22,500, up from $20,500. The age 50+ catch-up contribution limit is also increasing from $6,500 to $7,500 for the 403(b) and 457(b) plans.
Dependent Eligibility Verification Review- Coming Spring 2023

• ISU to conduct verification review with Willis Towers Watson (WTW)
• ISU Fringe Benefits Accounting and Compliance (FBAC) to oversee the review
• Employees with 1+ dependents on Medical, Dental and/or Vision Insurance to receive letter requesting documentation
• Good time to update your dependents during open enrollment
Continuing to Manage Largest Expense

- Work with Employee Benefits Advisory Committee (EBAC)
- Adjustments made to monthly employee premiums past several years to ensure premium income covers rising expenses
- Healthcare costs trending up 5-9% in part due to delayed services as a result of pandemic
- Healthcare Literacy effort
- Adventure2 participation
- Dependent verification project
- Evaluating plan design- Data Warehouse Partnership
ISU Benefit Survey Open Nov. 1-15

- Measure employee preferences and satisfaction
- 15-20 minutes to complete
- Faculty and staff participation will be crucial

<table>
<thead>
<tr>
<th>Better understanding of benefits opportunities</th>
<th>Drive improvements in benefits education and communication with plan participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable UHR Benefits staff to provide enhanced service to employees</td>
<td>Support initiatives for attracting and retaining employees</td>
</tr>
</tbody>
</table>

Outcomes
Healthcare Consumerism/Literacy

**GOAL:** Build out healthcare and benefit consumerism tools and training

**NEW healthcare literacy workshops for employees**
- 2 classes were offered earlier this week
- Delivered online and free to attend
- Over 150 employees registered

**Designed to help employees:**
1. Understand how to use health insurance
2. Manage health care expenses
3. Identify resources to solve problems
Introducing ALEX

- Part of plan to advance healthcare literacy
  - Advances support for applicants and next generation of employees
- Virtual benefits counselor
- Explains benefit options and helps select the best plan
- ALEX is optional; **Benefits must still elected in Workday**
Why ALEX?

- For the next generation of workers
- 500+ interactions in first four days

"I took some time over my lunch to walk through the new “Alex” virtual benefits counselor. It was so fun and educational. I think I am pretty savvy about my benefits, but Alex convinced me I need to make a change. I just wanted to pass this information along. Many thanks to our UHR colleagues who brought this to us!”

“Just some feedback on the new ALEX program. Its GREAT!!! I love the voice and I actually was laughing out loud as some of the comments. It so engaging and fun!!"
Perks to Working at ISU You Might Not Know About

**Adoption Assistance**
- Three-year pilot
- Reimburses up to $5,000 per adoption

**Adventure2**
- Employee well-being program
- Provides incentives, promotes health/wellness
- Employees who participate have a turnover rate of 3.7% vs. 7.4% of non-registered employees

**EAP**
- Benefits-eligible employees and family
- On-site counseling services offered
- Counseling, financial consultations, life coaching, and more

**Student Loan Forgiveness**
- Provided through TIAA
- Identifies programs to reduce/eliminate debt

“I found out yesterday that my student loans are canceled through Public Service Loan Forgiveness, and I credit Savi with helping me get to this point. I had the correct type of loans for PSLF but was on the wrong payment plan. With the temporary expanded eligibility that Biden created and Savi employees helping me navigate how to consolidate my loans so they would all qualify, it worked. It took about a year.”
**Computers and software:** ISU Book Store sells Dell and Apple devices to faculty and staff for personal use at a discount. As with all purchases at the ISU Book Store, there is no sales tax. See the store’s [TechCyte website](#) for details. The bookstore also provides for employees’ personal use Office365, a suite of Microsoft software products that includes Teams, Word, Excel, PowerPoint and more.

**Health and wellness:** Employees with ISU health insurance have access to Wellmark’s Blue365, a service providing discounts related to nutrition, health, fitness, travel and more. See the deals or sign up at the Blue365 [website](#).

**ISU Dining:** Employees who sign up for the [staff charge plan](#) get $2 off breakfast and $3 off lunch and dinner at the all-you-can-eat campus dining centers at Friley Hall, Union Drive Community Center and the Maple-Willow-Larch Commons.

**Legal help:** Through ARAG, employees enrolled in ISU life insurance have access to a variety of do-it-yourself legal forms, such as a will, living will, and power of attorney for both health care and financial matters. Use the ISU group policy number (1116190) to [sign up online](#). Also, [EAP services](#) include a free 30-minute consultation with an attorney and a 25% discount for any further legal work from the consulting attorney.

**Office and computer supplies:** Employees can buy office supplies and equipment from [ODP Business Solutions](#) (formerly Office Depot Business Solutions) at the university’s rates and receive free shipping. The same deal is available from [CDW-G](#), which sells computers, printers and other office equipment.

**Recreation services:** Faculty and staff can [join Recreation Services](#) at a reduced rate of $30 a month, a membership that includes access to the fitness facilities at State Gym, Lied Recreation Athletic Center and Beyer Hall. See membership information online. A free [7-day trial](#) is available.

**Reiman Gardens:** Faculty and staff receive 20% off any level of Reiman Gardens [membership](#).

**Vision:** For a monthly premium, employees can purchase an [Avesis eyewear plan](#) that covers contact lenses and eyeglasses. Discounts on eyeglasses and lenses also are available to those enrolled in Delta dental insurance. Both Delta and Avesis provide discounts on laser vision correction, as does Principal for employees enrolled in either life or long-term disability insurance. Call 888-647-3937 or see the [webpage](#) for more information about Principal’s discount.