

Financial Reporting: Changing Organization Assignments

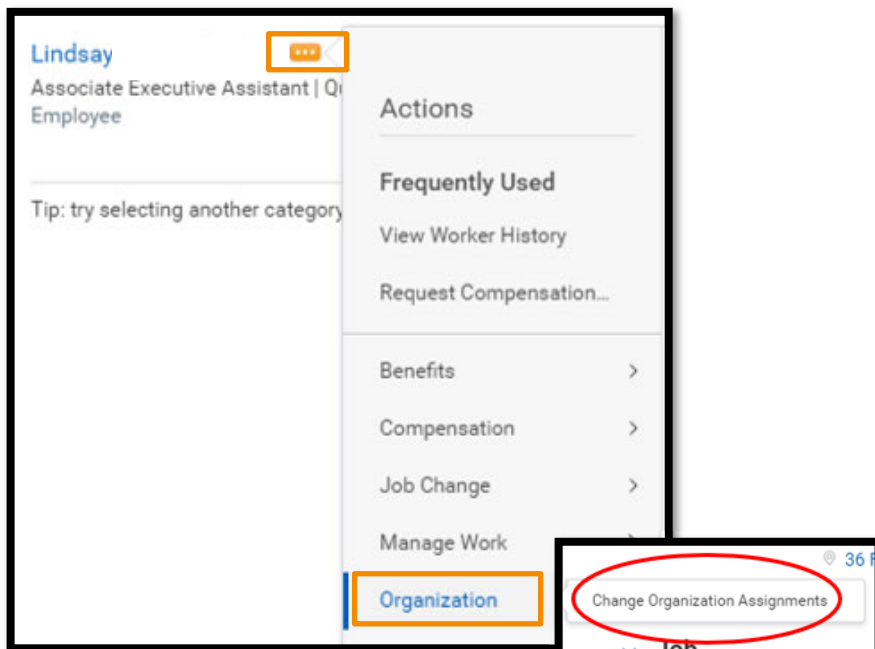
DEFINING ORGANIZATION ASSIGNMENTS

In Workday, every worker has **financial organizations**, which are assigned at hire or job change (on the job requisition) or can be independently changed through a process called Change Organization Assignments. These financial organizations include:

- **Company** is the entity; it is typically the same as the first four digits of the cost center.
- **Cost Center** (formerly known as accounting unit) is the primary department where salary is to be charged (costing allocations are assigned in a separate business process). This is a 4 digit number.
- **Region** is the demographic region used for financial statement reporting; this may not be the same as the worker's physical location.
- **Grant** indicates if the worker is paid out of a grant or fund (this is typically seen in Research).

AD HOC ORGANIZATION ASSIGNMENT CHANGES

1. Navigate to the worker you want to change by typing the worker's name or number in the search box at the top of the Workday home page.
2. Click on the actions brick next to the worker name (it will show up when you move the mouse to the end of the worker's name).



3. Go down and hover over **Organization** and select **Change Organization Assignments** as follows.

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4. Enter in the **Effective Date** using the beginning of the applicable pay period.

You may be prompted to confirm which “Job” to update if the worker has additional jobs.

Click **OK**.

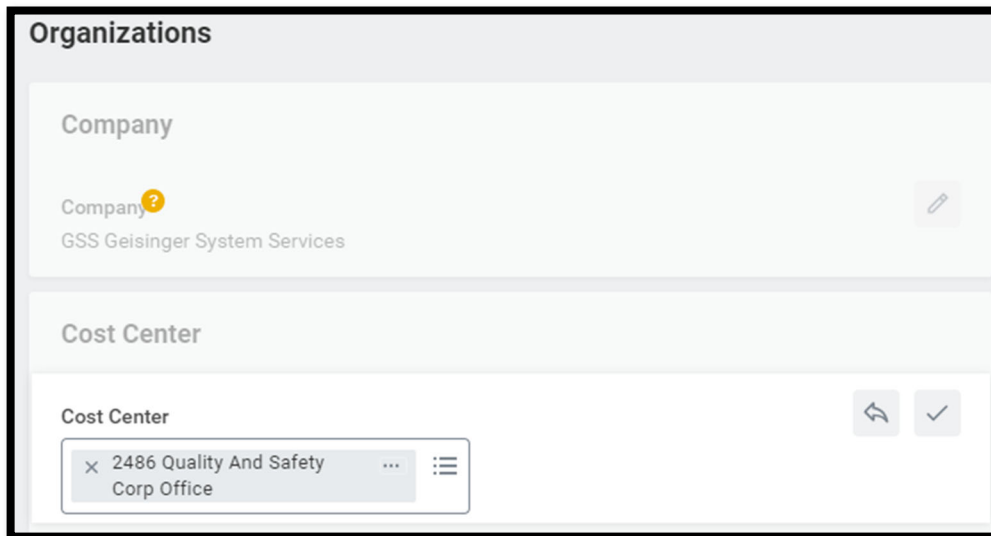


A screenshot of a form with three rows. The first row is 'Effective Date' with a red asterisk, a date field containing '09/27/2020', and a calendar icon. The second row is 'Worker' with a red asterisk and the name 'Lindsay'. The third row is 'Job' with a red asterisk and the text 'P-16840 Associate Executive Assistant - Lindsay'.

5. Review the organizations for accuracy.

To change a selection, click the **X** in the box you wish to change, type in the new value and hit Enter on your keyboard.

Click **Submit**.



A screenshot of a web interface titled 'Organizations'. It has three sections: 'Company', 'Cost Center', and another 'Cost Center' section. The 'Company' section shows 'Company?' with a question mark icon and 'GSS Geisinger System Services' with an edit icon. The 'Cost Center' section shows 'Cost Center' with a refresh icon and a checkmark icon. The second 'Cost Center' section shows a dropdown menu with 'x 2486 Quality And Safety Corp Office' and a menu icon.

MASS ORGANIZATION ASSIGNMENT CHANGES

If your department’s cost center structure is changing (typically as a result of fiscal year changes), your leader can contact their HR Business Partner for assistance to have the changes loaded to Workday en masse. **Mass changes are defined as impacting more than 15 workers.**