

# Human Resource Management System

## Workday Job Aid Managing Employees



This Job Aid describes the information People Managers can view about their workers in the organization.

- Employees
- People Managers
- Human Resources

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### 1. Managing Employees Overview

Workday provides specific tools to enable supervisors to effectively manage their team. The application that is most used by managers is **My Team Management**. From this application, a manager will have access to information on the members of their team. Here are some key capabilities:

- View a complete list of the members of your team. From that list, you can view the employee's record and access information and tasks based on your security access rights.
- View the details of any training your team is registered for.
- Initiate action to Transfer, Promote, or Change the employee's job designation.
- Change the location where the employee works.
- Change the employee's business title.

When situations prevent an employee from performing a self-service function, the manager has access to perform that function on their behalf. Those tasks are accessed by clicking on the **Actions** button of the employee.

### 2. Position Management and Hiring

There will be times when a manager needs to add headcount to their team. There are specific steps that need to be performed, with the appropriate approvals along the way, to allow this to happen. Using Workday, this process is straightforward and has the necessary checks and balances in place to ensure that only approved requests are processed.

Positions, for the most part, are created annually as part of the budget process. A budget office representative would leverage the **Create Position** task to add any approved positions to Workday. Please note that if a budget-approved position does exist but is unavailable to use (frozen), the HR Partner would have to request that the existing position be unfrozen.

After the budget office completes the create position initiation step it is sent to the Compensation Partner where they will assign the following: compensation package, grade,



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grade profile, and any appropriate allowance plans. Once the compensation partner has completed their task it gets sent back to the budget office where the Org Assignment is made. This includes the designation of a Cost Center, Fund Appropriation, and Unit. At this point the create position process is complete and the position is available.

Recruiting will then create a requisition for the position and work to find viable candidates. Once candidate(s) have been identified and one has accepted the County's offer, the hiring process begins.

The hiring process involves confirming all information about the new hire that was collected or set up during the recruitment phase. To begin this process, the manager will go to the Supervisory Org to which this hire belongs. By clicking on the **Staffing** tab and scrolling down to **In Progress Staffing Actions**, one can find the request and where it stands.

Typically, the review/approval resides with the HR Partner. Tasks to complete this process will reside in their Inbox. The first task will be the **Revise Employee Hire**. This is where the new hire's information is reviewed and revised (if necessary). Once that task is

completed, the next task is the **Change Organization Assignments**. Here, organization-level info, such as Cost Center, Fund, and Appropriation are reviewed (Revisions should not be necessary as this was assigned by the budget office during the create position process.). Following that, the **Assign Collective Agreement** task is processed.

The **Propose Compensation Hire** is the next task to complete. The HR Partner will review the compensation and related grade information to confirm its accuracy (Revisions should not be necessary as this was assigned by the compensation partner during the create position process.). Once this task has been completed, the **Change Personal Information** task is assigned. Here, the HR Partner will make sure that the new hire's date of birth is filled in. If it is not, they will enter it at this time. In the next step, the HR partner will review the various **Government IDs** provided by the employee. This would include SSN and Drivers' License Number. It should be noted that once the new hire is issued a County ID, that information will be added to this section of their employee record. At this point, the HR Partner will click **Approve** to move the process forward. The final step for the HR partner is to **Add Probation Period** to the new hire.



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The next task is sent to the hiring manager. They perform the **Onboarding Setup** task. This is where the manager can designate “People to Meet” as well as identify “Helpful Contacts” for the new hire. Within this task, any equipment the new hire will need to do their job can be specified here. Once this task is completed the HR Partner will approve the Onboarding Setup and then move on to the **Assign Pay Group** task. Once this last task is approved, the **Onboarding** task is sent to the new Hire's Inbox, waiting for them to access it on their first day of work.



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### 3. Employee Job and Compensation Changes

There will be times during an employee's tenure with the County that their information within Workday will need to be changed. For example, specific data changes such as the location of where they work or their business title, as well as events like promotions and compensation changes all fall under this category.

The manager role has the access to initiate these business processes. The typical way to begin one of these processes is to enter the employee's name in the search bar. When their record comes up, click on the **Actions** button. The two menu items relative to this topic are **Job Change** and **Compensation**.

The following are the options to select from under **Job Change**.

Start Job Change
Transfer, Promote or Change Job
Change Business Title
Change Location
Add Contract
Add Job
Assign Collective Agreement
End Collective Agreement Assignment
Start International Assignment
Launch Onboarding
Report No Show
Terminate Employee
Manage Probation Periods

In each case, the manager will select the appropriate task and complete the forms that are required. Please note that fields flagged with a \* are required. Also, many of these tasks will require an approval process that involves several layers of approvals (e.g. Labor Relations, Civil Service, Payroll, and Audit and Control).



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The following are the options to select from under the Compensation.

Request Compensation Change	
Request Stock Grant	
Request One-Time Payment	
Add Stock Grant	
Maintain Employee Stock Vesting	
Create Eligible Earnings Override	
<hr/>	
View Compensation	
View Compensation History	
View Compensation History - All Past and Present Positions	
View Compensation Basis Details	
View Estimated Compensation for a Period	
View Reimbursable Allowance Plan Activity	
View Total Rewards	

In each case, the manager will select the appropriate task and complete the forms required. Please note that fields flagged with a \* are required. . Also, many of these tasks will require an approval process that involves several layers of approvals (e.g. Labor Relations, Civil Service, Payroll, and Audit and Control).



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### 4. Terminate Employee

The **Termination** task is used when an employee is leaving the County for both voluntary and involuntary reasons. This process can be initiated by the manager of the employee or an HR Partner. It will require several levels of approval before it is completed. Those involved in the approval process are HR Partner, Manager's Manager, Civil Service, Labor Relations, Payroll, and Audit and Control.

**Note:** The employee's County email address must be removed from the account for the employee to be able to continue to access their information stored in Workday. The employee's Personal email address must be on file in Workday as that will become their new username to access Workday.


Here are the steps to accomplish this task:

- The manager will enter the employee's name in the search bar and click on the result returned to access the employee record.
- Click on the **Actions** button and scroll down to the **Job Change** item.
- Hover over Job Change and click on the **Terminate Employee** task.
- Complete the following sections of the Terminate Employee form (\* indicates required information).

**Reason** (Click the pencil icon to enter edit mode).

Primary Reason \*

Secondary Reasons



- Select the Primary reason for termination from the list provided. You must first select whether the termination is voluntary or involuntary.
- As an option, you can also select a Secondary Reason for termination.




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**Details** (Click the pencil icon to enter edit mode).

Termination Date *	
Last Day of Work *	
Pay Through Date *	
Resignation Date	

- Enter the last day the employee worked in the **Termination Date** field.

**NOTE:** The **Last Day Worked** and **Pay Through Date** fields will be auto-populated based on the Termination Date entered.

- Enter the date listed on the resignation letter in the **Resignation Date** field.


**Regrettable** (Click the pencil icon to enter edit mode).

Regrettable	
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- Select **Yes** or **No**.

**Position Details** (Click the pencil icon to enter edit mode).

**NOTE:** Both items default to no.

Close Position	
No	
Is this position available for overlap?	
No	

- Do not check the **Close Position** checkbox. At the County, all positions are frozen when they become vacant.
- There is never a situation in the County when two people can occupy the same position at the same time. For this reason, the answer to the overlap question is always No.





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### Attachments

- Attach documentation for the termination (such as a resignation letter, retirement letter, or appropriate separation document).

**NOTE:** Though this does not have a red asterisk (\*), it is a required entry.

- Click **Submit**.
- Click **Done**.

This task will now be sent to the HR partner for review. Upon their approval, it will move through several layers of additional approvals before it is deemed complete.

**Note:** An optional step added to the Terminate Employee business process is the Freeze Position task. If the position held by the terminated employee is not to be backfilled the HR partner can place a freeze on the position. This in effect suspends the position and prevents anyone from hiring for it without actually deleting the position. This is valuable if the position is expected to be used in the future but because of budgetary or restructuring reasons, the position is not being filled at this time.

**Note:** If the Termination Reason is **Deceased** the HR Partner needs to process the To-Do task **Maintain Date of Death**. This To-Do will open the **Edit Personal Info** task. It is there that the death date is entered. Once that date is saved the HR Partner needs to navigate back to the To-Do item and click **Submit** to signify that it was completed.



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### 5. Managing Voluntary Separations

When an employee ends their employment with the County it is referred to as a Voluntary Separation. Some examples of this are resignation or retirement. This event is executed using the Terminate Employee process (See [Terminate Employee](#) lesson). When selecting the **Primary Reason** at the top of the form, select from the Voluntary list and then complete the rest of the form.



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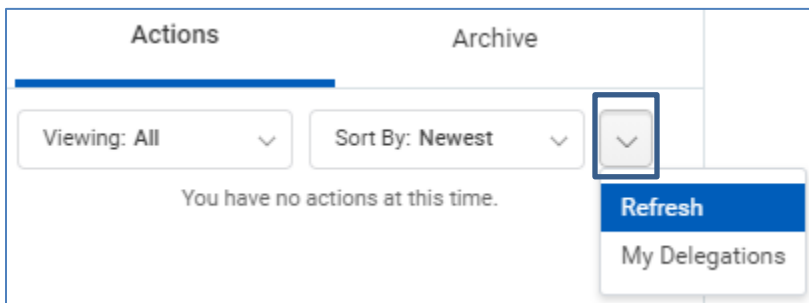


### 6. Requesting a Delegation

There are times when a manager is unavailable to perform their assigned Workday tasks and needs a co-worker to step in and act on their behalf. When this situation occurs, the manager can set up a delegation rule in Workday. This will allow the co-worker to act on the manager's behalf.

Here are the steps the manager follows to set up a delegation:

- Go into your Workday Inbox.
- To the right of the sort options dropdown is a box with a downward pointing arrow. Click on that arrow.



- Click on the **My Delegations** option.
- Click on the **Manage Delegations** button (\* indicates required information).

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> For all Business Processes <input type="radio"/> For Business Process <input type="text"/> <input checked="" type="radio"/> None of the above
					<input type="checkbox"/> Retain Access to Delegated Tasks in Inbox
					Delegation Rule



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- Enter the date to start the delegation in the **Begin Date** field.
- Optionally, you can enter a date the delegation is to end in the **End Date**. If you are uncertain as to when this delegation will end leave it blank and address it upon your return to work.
- Select the person or persons you are delegating to from the list provided in the **Delegate** field.
- In the **Start On My Behalf** field identify the Business Processes that you want the delegate to start on your behalf.
- The last section (**Do Inbox Tasks On My Behalf**) deals with the tasks listed in your Inbox that were generated by business processes. There are three radio buttons to choose from.
  - a. If you want the delegate to process everything that comes into your Inbox select the **For all Business Processes** option.
  - b. If there are specific business processes that you want them to process from your Inbox select the **For Business Process** option and select the specific business processes that you want them to take care of.
  - c. If you do not want them to process any tasks sent to your Inbox select the **None of the Above** option.
  - d. It is recommended that you check off the **Retain Access to Delegated Tasks in Inbox** box to retain the ability to complete your tasks. This will cause delegated tasks to be sent to your InBox as well as the designated delegate(s).
- Click the **Submit** Button.

**NOTE:** The delegation request will route to your manager for approval.



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### 7. Receive a Delegation Assignment

When a person is designated to be a delegate, they will begin to receive tasks in their Inbox that were originally destined for the person that created the delegation. The task will list the person you are receiving the task **On behalf of**.

Here are the steps the delegate follows to process a delegated task:

- Go into your Workday Inbox.
- Click on the **Actions** listed in your InBox that contains the **On behalf of** phrase.
- In the details section to the right click on the **Switch Account** button.
- This will bring up a confirmation screen confirming that you are about to act as the person who made you a delegate. Click **OK**.
- This will take you to the Delegation Dashboard. It displays an empty page.
- Go into the person's InBox and find the same task. Process the task.

**Note:** Click on the Mail tray icon in the upper right corner of the page to access the InBox.

- Click on the person's profile icon, click on the Switch Account option, and click on your name to return to your account.

**Note:** The Profile icon will display as either a Cloud image or a picture of the person depending on if the person uploaded their photo to Workday.

- Go back into your Inbox and click on the **Archive** tab. There you will see the task you just worked on as successfully completed.



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### 8. Changing an Employee's Supervisory Organization

There are times when an employee is found to be assigned to the wrong Supervisory Organization. When that occurs the **Payroll Rep** needs to move the worker from the incorrect supervisory org to the correct one.

Here are the steps to move a worker from one supervisory org to another:

- The payroll rep will enter the name of the sup org that the employee is currently a member of.
- Click on the **Sup Org** listed in the search results.
- Once the Sup Org displays click on the "Twinkie" button  to the right of the Sup Org name.
- On the **Actions** menu that displays, hover the mouse over the **Reorganization** option and then click on the **Move Workers (By Organization)** menu item.
- On the next screen, set the Effective Date to the date the employee joined the new Sup Org.  
**Note:** If this is to correct an assignment that was wrong since GoLive enter the GoLive date (December 27, 2021).
- Click **OK**.
- Now select the **Worker** you are looking to move.
- Next, select the **Organization** that the worker is supposed to be assigned to.
- Enter a **Comment** explaining the reason for the move.
- Click **Submit**.

At this point, the selected worker will have been successfully moved to the desired Supervisory Organization.



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### 9. Change Work Contact Information

Changing work contact information cannot be done by the employee. The employee must engage their Payroll Rep to make such changes.

Here are the steps the Payroll Rep must follow to change an employee's **Work Contact Information**:

1. Enter the employees' name in the search at the top of the page.
2. Select the employee from the results returned.  
**Note:** At this point, you should be on the Employee's Profile page.
3. Click the Actions button on the left side of the screen, underneath the employee's name.
4. In the menu that displays hover over the **Personal Data** menu item and then click on the **Change Work Contact Information** item.
5. Review the different sections of data displayed and then click on the pencil icon for the section you wish to modify or click the Add button for the section you wish to add information to.
6. Once the additions/updates have been made to a given section, click on the checkmark box for that section to save those changes.
7. After all additions/updates have been performed click on the **Submit** button at the bottom of the page to complete the processing on that page.  
**Note:** You will be returned to the employee's profile page after clicking the Submit button.



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### 10. View Remaining Tasks of a Business Process

There are many business processes defined in Workday that are made up of multiple tasks, which are assigned to a variety of individuals. For those business processes that are not already complete, several important pieces of information may need to be understood by the Payroll Rep. Those pieces of information would include; what tasks have been completed, what tasks remain, and who is responsible for completing the task that is currently in process. This will allow for proper follow-up and accurate status updates.

The steps required to view the current state of a business process are as follows:

1. On the Search bar enter the employee's name that has an in-progress business process.
2. Click on the employee from the list of returned results.

**Note:** This will take you to their Employee Profile.

3. Click on the **Job** menu item listed on the left side of the page.
4. On the next page click on the **More** menu tab at the top/right of the page.
5. From the drop-down list click on the **Worker History** item.
6. On the next page click on the **View Worker History by Category** button at the top of the page.

**Note:** This will bring you to the Business Processes, broken up by category, that were run for the employee in question.

7. Click on the specific business process of interest to view the details.
8. On the next page click on the **Process** tab.
9. This will provide a list of the tasks that make up the selected business process.
10. Scroll through the list toward the bottom, paying careful attention to each row's value in the **Status** column.

**Note:** If the Business Process has not been completed the last task in the list will be listed with a status of "Awaiting Action". In the **Person** column for that task, you will find the name of the person(s) who are responsible for completing the task.

**Note:** If there are more tasks beyond that one, you will find a **Remaining Process** button at the bottom of the page. Clicking on that button will display the remaining tasks to be performed along with the person(s) responsible for completing each task.

11. Once you have completed your review of the remaining tasks click on the Workday symbol at the top left of the page to return to the Homepage.





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Change Log				
Revision Number	Date of Change	Affected Lesson	Action	Initials
1.1.1.1	09/15/2021		Log Created	RK
1.1.1.2	01/03/2022	Added lesson Changing an Employee's Supervisory Organization	Added lesson	RK
1.1.1.2	01/27/2022	Change Work Contact Information	Added lesson	RK
1.1.1.3	02/03/2022	View Remaining Tasks of a Business Process	Added Lesson	RK
1.1.1.4	04/20/2023	Terminate Employee	Added Note about removing the Employee's County Email address.	RK

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