

Human Resource Management System

Workday Job Aid

HR and Manager Self-Service Overview



This Job Aid serves as a reference guide for Human Resource and managerial self-service functions.

- Employees
- People Managers
- Human Resources

Contents:

1. [Overview of HR/Managerial Self-Service Functions](#)
2. [How to use Workday as an HR/Managerial Employee](#)
3. [Viewing/Changing Employee Personal Information](#)
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1. Overview of HR/Managerial Self-Service Functions

This document serves as a resource to navigate through Workday as a Suffolk County employee with Human Resource capabilities as well as an employee with managerial functions. Use this document as a guide for finding how to access and complete common tasks that these employees may be required to do within Workday.

Please be advised this document does not explain the steps to complete certain self-service processes, however, it references the job aids and lessons within which you may find the necessary steps to complete the desired task.

If you need additional assistance in performing a certain function, please contact us at HRMShelpline@suffolkcountyny.gov.



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Workday Job Aid HR and Manager Self-Service Overview



Suffolk County has implemented Workday as a modern human resources management system (HRMS) to provide self-service tools with an intuitive and user-friendly design. Workday is a global human resources system that is used to manage and coordinate all the resources, information, and functions of an organization. System capabilities include managing resources as well as accessing and viewing personal, job, and pay information in one centralized platform.



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2. How to use Workday as an HR/Managerial Employee

Within this section, use the following links to Suffolk County Job Aids:

[Job Aid - Workday Overview](#)

[Job Aid - Workday Getting Started](#)

[Job Aid - Managing Orgs, Positions, Sup Orgs](#)

- 1. What is my role within Workday as a Human Resources Employee?**
See Job Aid – [Workday Overview](#)
Lesson 4 Overview for HR
- 2. What is my role within Workday as a Manager?**
See Job Aid – [Workday Overview](#)
Lesson 3 Overview for People Managers
- 3. How can I refine my search results within Workday using the search bar?**
See Job Aid – [Workday Getting Started](#)
Lesson 7 Update Search Category Preference
- 4. How can I filter my inbox to refine my inbox messages?**
See Job Aid – [Workday Getting Started](#)
Lesson 9 Using your Inbox (Filters, Notifications, Approvals, Delegation)
- 5. What are approvals within Workday?**
See Job Aid – [Workday Getting Started](#)
Lesson 9 Using your Inbox (Filters, Notifications, Approvals, Delegation)
- 6. What are delegations?**
See Job Aid – [Workday Getting Started](#)
Lesson 9 Using your Inbox (Filters, Notifications, Approvals, Delegation)



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7. What is a supervisory organization?

See Job Aid – [Workday Getting Started](#)

Lesson 11 Key Terminology

See Job Aid – [Managing Orgs, Positions, Sup Orgs](#)

Lesson 2 Working with Supervisory Organizations

8. What is an Org Chart?

See Job Aid – [Workday Getting Started](#)

Lesson 11 Key Terminology



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3. Viewing/Changing Employee Information

Within this section, use the following links to Suffolk County Job Aids:

[Job Aid - View-Change Personal Information](#)

[Job Aid - View Team Information](#)

1. If an employee provides additional identification, how can I add it in Workday?

See Job Aid – [View-Change Personal Information](#)

Lesson 11 Edit Other IDs

2. How do I view my team?

See Job Aid – [View Team Information](#)

Lesson 1 Team Information Overview, Lesson 2 My Team

3. How do I view the information of a direct report?

See Job Aid – [View Team Information](#)

Lesson 3 View Employee Information

4. How do I view the information of any employee?

See Job Aid – [View Team Information](#)

Lesson 3 View Employee Information

5. How can I change an employee's information (compensation change, job change, personal data, talent, time and leave, etc.)

See Job Aid – [View Team Information](#)

Lesson 3 View Employee Information

6. How do I view an Org Chart?

See Job Aid – [View Team Information](#)

Lesson 4 View Organizational Chart



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4. Time Entry/Submission

Within this section, use the following links to Suffolk County Job Aids:

[Job Aid - View Team Information](#)

[Job Aid - Time Entry](#)

1. What does time entry/submission look like in Workday?

See Job Aid – [Time Entry](#)

Lesson 1 Time Entry Overview

2. How do I approve or send back a time entry?

See Job Aid – [Time Entry](#)

Lesson 3 Approve and Send Back Time Entry

3. What does the time entry submission process look like in Workday?

See Job Aid – [Time Entry](#)

Lesson 4 Time Entry Submission & Approval Schedules

4. How do I view my team's schedule?

See Job Aid – [View Team Information](#)

Lesson 7 View Time Off Reports

5. How do I view my team's time clock history?

See Job Aid – [View Team Information](#)

Lesson 7 View Time Off Reports



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5. Time Off/Leaves of Absence

Within this section, use the following links to Suffolk County Job Aids:

[Job Aid - View Team Information](#)

[Job Aid - Time Off](#)

[Job Aid - Leave](#)

1. What does time off look like in Workday?

See Job Aid – [Time Off](#)
Lesson 1 Time Off Overview

2. What is the time off approval process?

See Job Aid – [Time Off](#)
Lesson 6 Approve & Deny Time Off Requests

3. How do I view an employee's time-off requests and balances?

See Job Aid – [View Team Information](#)
Lesson 6 View Employee Time Off

4. How do I view my team's time off?

See Job Aid – [View Team Information](#)
Lesson 7 View Time Off Reports

5. How do I know whether an employee or a manager must correct a submitted time off request?

See Job Aid – [Time Off](#)
Lesson 3 Request, Correct, Cancel Time Off

6. When must an employee's time off balances be corrected? How is this entered?

See Job Aid – [Time Off](#)
Lesson 7 Adjust and Override Time Off Balances



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7. What does the overtime request process look like in Workday?

See Job Aid – [Time Off](#)

Lesson 4 Request Overtime

8. What does the leave of absence process look like in Workday?

See Job Aid – [Leave](#)

Lesson 1 Leave Overview

9. How do I view leaves of absence for an employee?

See Job Aid – [Leave](#)

Lesson 6 (Payroll Reps, Bene Partners, Pay Partners) Overview + What You Have to Do

10. What is the leave of absence approval process? What is each employee's role in this process within Workday?

See Job Aid – [Leave](#)

Lesson 3 Approve/Deny Leave of Absence, Lesson 4 Process Leave Business Flow

11. How can I place an employee on leave?

See Job Aid – [Leave](#)

Lesson 6 (Payroll Reps, Bene Partners, Pay Partners) Overview + What You Have to Do

12. What happens if there are open items in an employee's inbox who goes on leave?

See Job Aid – [Leave](#)

Lesson 6 (Payroll Reps, Bene Partners, Pay Partners) Overview + What You Have to Do

13. What happens if an employee transitions from one leave to another?

See Job Aid – [Leave](#)

Lesson 6 (Payroll Reps, Bene Partners, Pay Partners) Overview + What You Have to Do



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14. Can I extend an employee's leave of absence?

See Job Aid – [Leave](#)

Lesson 6 (Payroll Reps, Bene Partners, Pay Partners) Overview + What You Have to Do

15. How do I return an employee from leave?

See Job Aid – [Leave](#)

Lesson 8 Request Return from leave of Absence- HR



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6. Managing Employees

Within this section, use the following links to Suffolk County Job Aids:

[Job Aid - Managing Employees](#)

[Job Aid - Managing Orgs, Positions, Sup Orgs](#)

[Job Aid - Manage Compensation](#)

1. What does the employee lifecycle look like in Workday?

See Job Aid – [Managing Orgs, Positions, Sup Orgs](#)

Lesson 1 Understanding the Employee Lifecycle

2. How can Workday help a supervisor manage his/her team?

See Job Aid – [Managing Employees](#)

Lesson 1 Managing Employees Overview

3. If an employee is having trouble/unable to perform an action, how can I do it on his/her behalf?

See Job Aid – [Managing Employees](#)

Lesson 1 Managing Employees Overview

4. How are positions created?

See Job Aid – [Managing Employees](#)

Lesson 2 Position Management and Hiring

5. How do I perform job change and compensation changes for an employee?

See Job Aid – [Managing Employees](#)

Lesson 3 Employee Job and Compensation Changes

See SC-CM-TRN-040 Job Aid – Manage Compensation

Lesson 2 Change Jobs



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6. How is an employee terminated? (voluntary and involuntary separation)

See Job Aid – [Managing Employees](#)

Lesson 4 Terminate Employee, Lesson 5 Managing Voluntary Separations

7. How can I use the delegation process to assign tasks for an employee?

See Job Aid – [Managing Employees](#)

Lesson 6 Requesting a Delegation, Lesson 7 Receive a Delegation Assignment



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7. Position Management

Within this section, use the following links to Suffolk County Job Aids:

[Job Aid - Managing Orgs, Positions, Sup Orgs](#)

[Job Aid - Organizations](#)

[Job Aid - Staffing](#)

[Job Aid - Manage Hire Process](#)

1. What is position management?

See Job Aid [Managing Orgs, Positions, Sup Orgs](#)
Lesson 4 Understanding Position Management

2. What does the position lifecycle look like in Workday?

See Job Aid [Managing Orgs, Positions, Sup Orgs](#)
Lesson 3 Understanding the Position Lifecycle

3. How can I freeze/unfreeze a position in Workday?

See Job Aid [Staffing](#)
Lesson 7 Manage Position Freeze/Unfreeze

4. How do I promote an employee in Workday?

See Job Aid [Organizations](#)
Lesson 10 Promote Worker

5. How do I change an employee's job?

See Job Aid [Organizations](#)
Lesson 11 Change Job



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6. How do I transfer an employee?

See Job Aid [Organizations](#)
Lesson 12 Transfer Worker

7. How do I change the title of an employee?

See Job Aid [Staffing](#)
Lesson 2 Title Change

8. How do I change the service date of an employee?

See Job Aid [Staffing](#)
Lesson 3 Service Dates Change

9. How do I assign an employee to an additional job in Workday?

See Job Aid [Organizations](#)
Lesson 13 Add Additional Job

10. How do I change retiree status for an employee (or non-employee) in Workday?

See Job Aid [Staffing](#)
Lesson 4 Manage Retiree Status

11. How do I assign a pay group to an employee?

See Job Aid [Staffing](#)
Lesson 5 Assign Pay Group

12. How do I change the default funding assignment for an employee's job?

See Job Aid [Manage Hire Process](#)
Lesson 3 Change Organization Assignment



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8. Job Requisitions

Within this section, use the following link to the Suffolk County Job Aid:

Job Aid - [Create, Edit, Close, and Freeze Job Requisition](#)

1. What does the Recruitment process in Workday look like?

See Job Aid – [Create, Edit, Close, and Freeze Job Req and Position](#)
Lesson 1 Overview of Recruiting Process

2. How do I create a job requisition?

See Job Aid – [Create, Edit, Close, and Freeze Job Req and Position](#)
Lesson 2 Create Job Req./Position

3. How do I create an evergreen requisition?

See Job Aid – [Create, Edit, Close, and Freeze Job Req and Position](#)
Lesson 7 Create Evergreen Requisition

4. How do I close a job requisition?

See Job Aid – [Create, Edit, Close, and Freeze Job Req and Position](#)
Lesson 5 Close Job Req.

5. How do I close an evergreen requisition?

See Job Aid – [Create, Edit, Close, and Freeze Job Req and Position](#)
Lesson 9 Close Evergreen Req.

6. How do I edit a job requisition?

See Job Aid – [Create, Edit, Close, and Freeze Job Req and Position](#)
Lesson 4 Edit Job Requisition

7. How do I edit an evergreen requisition?

See Job Aid – [Create, Edit, Close, and Freeze Job Req and Position](#)
Lesson 9 Change Evergreen Requisition



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8. How do I link an evergreen requisition to a job requisition?

See Job Aid – [Create, Edit, Close, and Freeze Job Req and Position](#)
Lesson 9 Change Evergreen Requisition

9. How do I edit a job posting?

See Job Aid – [Create, Edit, Close, and Freeze Job Req and Position](#)
Lesson 4 Edit Job Requisition

10. How do I freeze a job requisition?

See Job Aid – [Create, Edit, Close, and Freeze Job Req and Position](#)
Lesson 6 Freeze Job Requisition

11. How do I view a job requisition?

See Job Aid – [Create, Edit, Close, and Freeze Job Req and Position](#)
Lesson 6 Freeze Job Requisition

12. Can I cancel a job requisition?

See Job Aid – [Create, Edit, Close, and Freeze Job Req and Position](#)
Lesson 7 View/Cancel Job Requisition

13. How do I post a job?

See Job Aid – [Create, Edit, Close, and Freeze Job Req and Position](#)
Lesson 3 Post Job



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9. Recruitment

Within this section, use the following link to the Suffolk County Job Aid:

[Job Aid - Recruiting](#)

1. What does the job application process look like?

See Job Aid – [Recruiting](#)
Lesson 1 Review Candidate

2. How do I review a candidate that has applied?

See Job Aid – [Recruiting](#)
Lesson 1 Review Candidate

3. What is the candidate screening process?

See Job Aid – [Recruiting](#)
Lesson 2 Screen Candidate

4. What is the candidate assessment process?

See Job Aid – [Recruiting](#)
Lesson 3 Assess Candidate

5. What does the candidate interviewing step look like in Workday?

See Job Aid – [Recruiting](#)
Lesson 4 Interview Candidate

6. What is the candidate offer stage of the recruiting process?

See Job Aid – [Recruiting](#)
Lesson 5 Offer

7. How do I generate an offer letter?

See Job Aid – [Recruiting](#)
Lesson 5 Offer



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8. What does it look like to conduct a reference check in Workday?

See Job Aid – [Recruiting](#)

Lesson 6 Conduct Reference Check

9. How do I track conducting a background check in Workday?

See Job Aid – [Recruiting](#)

Lesson 7 Conduct Background Check

10. What does it mean to create prospects? How does this process work?

See Job Aid – [Recruiting](#)

Lesson 8 Create Prospects

11. Can I refer a candidate for a particular job?

See Job Aid – [Recruiting](#)

Lesson 9 Refer Candidate

12. How can current county employees apply for positions?

See Job Aid – [Recruiting](#)

Lesson 10 Find and Apply for Job



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10. Hiring/Onboarding

Within this section, use the following links to Suffolk County Job Aids:

[Job Aid - Manage Hire Process](#)

[Job Aid - Onboarding](#)

1. What is the hiring process lifecycle in Workday?

See Job Aid – [Manage Hire Process](#)

Lesson 1 Overview – The Hire Process Lifecycle

2. What does the onboarding process look like in Workday?

See Job Aid – [Onboarding](#)

Lesson 1 Onboarding Overview

3. How can I revise an employee record after an employee was first hired?

See Job Aid – [Manage Hire Process](#)

Lesson 2 Revise Employee Hire

4. How do I propose a compensation change for an employee's position?

See Job Aid – [Manage Hire Process](#)

Lesson 4 Propose Compensation

5. How do I assign a collective bargaining agreement?

See Job Aid – [Manage Hire Process](#)

Lesson 5 Assign CBA

6. How do I complete an I-9?

See Job Aid – [Manage Hire Process](#)

Lesson 6 Complete I-9

See Job Aid – [Onboarding](#)

Lesson 12 Complete Form I-9



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7. How is the onboarding process set up for a new hire?

See Job Aid – [Onboarding](#)

Lesson 2 Onboarding Setup



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11. Managing Organizations

Within this section, use the following links to Suffolk County Job Aids:

[Job Aid - Organizations](#)

[Job Aid - Staffing](#)

1. How do I activate an inactive organization?

See Job Aid [Organizations](#)

Lesson 1 Activation

2. How do I assign a superior organization to an existing supervisory organization?

See Job Aid [Organizations](#)

Lesson 2 Assign Superior

3. How do I create a subordinate supervisory organization for an existing supervisory organization?

See Job Aid [Organizations](#)

Lesson 3 Create Subordinate

4. How do I split an existing supervisory organization into multiple organizations?

See Job Aid [Organizations](#)

Lesson 4 Divide Organization

5. How do I make a change at the supervisory organization level to some or all employees within that organization?

See Job Aid [Organizations](#)

Lesson 5 Assign Organizational Assignment

6. How do I make a supervisory organization change to one specific employee?

See Job Aid [Organizations](#)

Lesson 6 Change Organization Assignments for Worker



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7. How do I make a supervisory organization change for a group of employees?

See Job Aid [Organizations](#)

Lesson 7 Change Organization Assignments for Worker by Organization

8. How do I assign a worker to a matrix organization?

See Job Aid [Organizations](#)

Lesson 8 Assign Matrix Organization

9. How do I remove an employee from a matrix organization?

See Job Aid [Organizations](#)

Lesson 9 Remove from Matrix Organization

10. How do I view a list of the county unions?

See Job Aid [Staffing](#)

Lesson 1 Union Membership Event

11. How do I denote an employee as terminated in a union?

See Job Aid [Staffing](#)

Lesson 1 Union Membership Event



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12. Payroll

Within this section, use the following link to the Suffolk County Job Aid:

[Job Aid - Payroll](#)

[Job Aid - Leave](#)

1. What does payroll processing look like in Workday?

See Job Aid – [Payroll](#)
Lesson 1 Payroll Overview

2. What processes must be completed during each pay period?

See Job Aid – [Payroll](#)
Lesson 1 Payroll Overview

3. How do I make tax elections for an employee?

See Job Aid – [Payroll](#)
Lesson 3 Make Tax Elections

4. What is the process of making manual adjustments to an employee's payroll record?

See Job Aid – [Payroll](#)
Lesson 6 Enter Manual Adjustments

5. How do I add a beneficiary? (employee passes away)

See Job Aid - [Payroll](#)
Lesson 7 Add Beneficiary



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6. How do I set up an allowance plan?

See Job Aid - [Payroll](#)

Lesson 8 Processing Allowance Plans

7. I came back to work earlier/later than my leave of absence states in Workday. What do I do?

See Job Aid - [Leave](#)

Lesson 7 Request Return from Leave of Absence- Employees



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13. Compensation

Within this section, use the following link to the Suffolk County Job Aid:

[Job Aid - Manage Compensation](#)

1. What is the Workday Compensation module?

See Job Aid – [Manage Compensation](#)
Lesson 1 Compensation Overview

2. How can I request a compensation change for an employee?

See Job Aid – [Manage Compensation](#)
Lesson 3 Comp/Ad-Hoc Comp Change

3. How can a manager request a one-time payment for an employee?

See Job Aid – [Manage Compensation](#)
Lesson 4 One Time Payments

4. How can an administrator propose a compensation change during a change job process?

See Job Aid – [Manage Compensation](#)
Lesson 7 Propose Compensation Change (Admin Only)

5. What compensation reports may be run within Workday?

See Job Aid – [Manage Compensation](#)
Lesson 6 Comp Reports and Dashboards

6. How is a Compensation Partner involved in the hiring process?

See Job Aid – [Manage Compensation](#)
Lesson 8 Make Offer Decision

7. How do I set up an allowance plan for an employee?

See Job Aid – [Manage Compensation](#)
Lesson 9 Create Allowance Plan



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8. How do I create a compensation plan?

See Job Aid – [Manage Compensation](#)

Lesson 10 Create Compensation Plan

9. How do I set up a compensation grade?

See Job Aid – [Manage Compensation](#)

Lesson 13 Set Up Compensation Grade

10. How do I update the compensation amount in a compensation grade step?

See Job Aid – [Manage Compensation](#)

Lesson 14 Set Up Compensation Step Adjustment

11. How do I assign new compensation plans to employees?

See Job Aid – [Manage Compensation](#)

Lesson 11 Rollout Compensation Plans to Employees

12. How do I remove a compensation plan from an employee?

See Job Aid – [Manage Compensation](#)

Lesson 12 Remove Compensation Plans From Employees



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14. Health Benefits

Within this section, use the following link to the Suffolk County Job Aid:

[Job Aid - Benefits](#)

1. How is a QMCSO Benefit Event processed in Workday?

See Job Aid - [Benefits](#)

Lesson 4 QMCSO Benefit Event (Benefit Partner)

2. What is my role in reviewing an employee's changed benefit elections due to a life event?

See Job Aid - [Benefits](#)

Lesson 5 Change Benefits (Life Events), Lesson 11 Review and Approve Elections

3. What is my role in reviewing COBRA eligibility for removed dependents?

See Job Aid - [Benefits](#)

Lesson 11 Review and Approve Elections

4. How do I enter Medicare Part D data?

See Job Aid - [Benefits](#)

Lesson 7 Change Medicare part D Data

5. How is an open enrollment event created?

See Job Aid - [Benefits](#)

Lesson 12 Open Enrollment

6. What is my role as a Benefits Partner in open enrollment events? Can I make elections on behalf of an employee?

See Job Aid - [Benefits](#)

Lesson 12 Open Enrollment



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7. How do I finalize open benefit events?

See Job Aid - [Benefits](#)

Lesson 13 Finalize Open Benefit Events

8. How do I cancel or change benefits events in progress?

See Job Aid - [Benefits](#)

Lesson 14 Run Benefits Event Status Report

9. How do I cancel or rescind an individual employee's benefit event?

See Job Aid - [Benefits](#)

Lesson 14 Run Benefits Event Status Report

10. What is my role in reviewing benefits when an employee is hired/there is a job change/employee goes on leave/employee is terminated/retirees and their dependents turn 65?

See Job Aid - [Benefits](#)

Lesson 15 Make Benefit Election

11. How do I determine if an individual is eligible for COBRA?

See Job Aid - [Benefits](#)

Lesson 15 Make Benefit Election



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15. Talent and Performance

Within this section, use the following link to the Suffolk County Job Aid:

[Job Aid - Manage Talent](#)

[Job Aid - Manage Goals](#)

[Job Aid - Performance](#)

1. How do I initiate a talent review?

See Job Aid – [Manage Talent](#)

Lesson 2 Initiate Talent Review

2. What does it look like in reviewing/approving an employee's talent review?

See Job Aid – [Manage Talent](#)

Lesson 4 Review/Approve Employee Talent Information (Manager)

3. How can I request/provide feedback to employees?

See Job Aid – [Manage Talent](#)

Lesson 16 Request/Provide Feedback

4. How can I add goals to an employee?

See Job Aid – [Manage Goals](#)

Lesson 1 Add Goals (Manager)

5. What is a check-in? How can I complete a check-in for an employee?

See Job Aid – [Manage Goals](#)

Lesson 3 Check-Ins

6. What is a development item? How can I access/add development items for employees?

See Job Aid – [Manage Goals](#)

Lesson 4 Development Items



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7. How do I start a performance review for an organization?

See Job Aid – [Performance](#)

Lesson 2 Start Performance Review for Organization (HR)

8. How do I start a performance review for an employee?

See Job Aid – [Performance](#)

Lesson 3 Start Performance Review Worker (Manager)

9. How do I start a complete employee evaluation (performance review)?

See Job Aid – [Performance](#)

Lesson 4 Manager Evaluation (Manager), Lesson 6 Provide Manager Review Comments (Manager)

10. What does disciplinary action look like in Workday?

See Job Aid – [Performance](#)

Lesson 7 Disciplinary Action

11. How can I initiate a performance improvement plan?

See Job Aid – [Performance](#)

Lesson 8 Performance Improvement Plans



