



WORKDAY FUNDAMENTALS:

HCM Initiate 2, HR Partners, & Academic Partners

Session 1

UNIVERSITY *of* WASHINGTON

INTEGRATED SERVICE CENTER

WELCOME

YOUR INSTRUCTOR(S) AND TRAINING

Lei Robinson

Training & Communications Specialist – ISC

Need to get in contact with us?

ischelp@uw.edu

UNIVERSITY *of* WASHINGTON

INTEGRATED SERVICE CENTER

YOUR INSTRUCTOR(S) AND TRAINING

We are great at:

- Introducing you to the specific role and responsibilities this training is designed for
- Showing you the tool, its limitations and abilities, and navigational tips
- Finding the right person to answer your question if we don't know the answer

We don't know as much about:

- UW, state, or federal policy analysis
- Knowing, handling, or optimizing processes unique to your unit
- Your role outside Workday

TODAY'S AGENDA

- Review of pre-training materials
- How to Initiate
 - Create Position/Requisition
 - Request Compensation Change
 - Request LOA/Return from LOA
 - Terminations
 - Reports

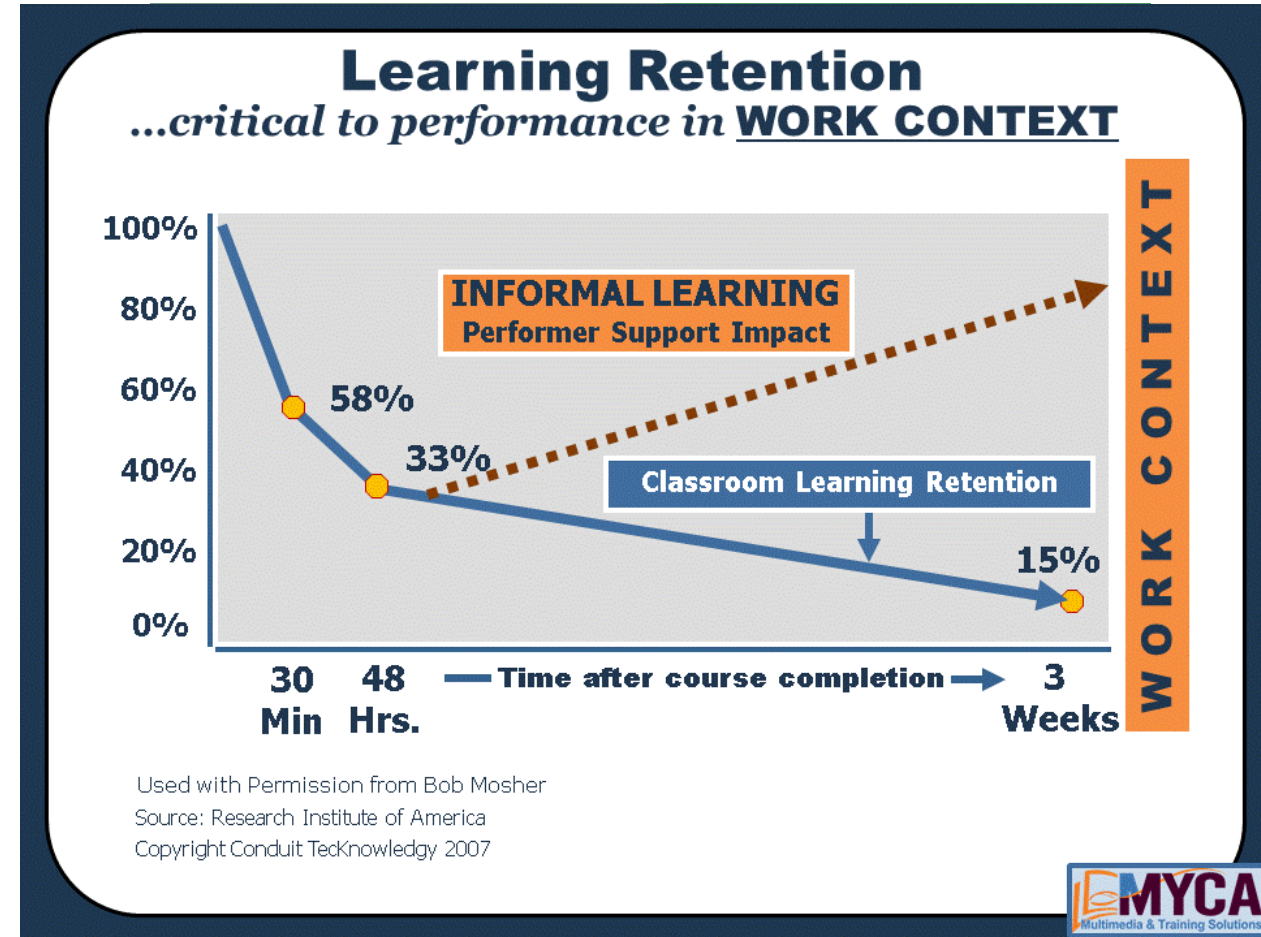
THE ISC SPACE

- Bathrooms
- Water
- Coffee shop on the Mezzanine floor

A special note: ISC employees are busy handling a huge influx of requests since go-live. While visiting, please use your instructor(s) as a direct resource. If the need arises or you are following up on a request, they can help you connect with the right person @ the ISC.

LEARNING SPACE

- The training room is not a prison
- Software training—getting ahead and falling behind
- Retention and learning
- Breaks



UNIVERSITY of WASHINGTON

INTEGRATED SERVICE CENTER

REFERENCES

- ISC contact number: (206) 543-8000
- ISC email: ischelp@uw.edu
- ISC website: isc.uw.edu
 - Login portal for Workday
 - User guides, reference materials, additional references
- DUO website: identity.uw.edu
 - Download DUO application
 - Update device information and notification preferences

YOUR SECURITY ROLES

DEFINING THE ROLES: HCM INITIATE 2s

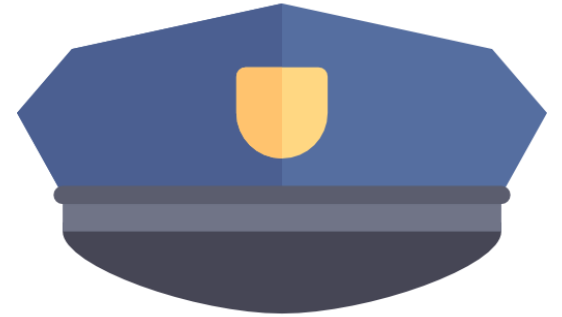
The HCM Initiate 2 is the unit administrator who:

- Supports one or more supervisory organizations
- Can initiate most HR-related actions
- Actions are approved by an Academic or HR Partner

DEFINING THE ROLES: PARTNERS

The HR/Academic Partner is the unit expert who serves as:

- The **“Process Gatekeeper”** who is a policy expert responsible for initiating and/or approving HR & payroll business processes in Workday.
 - Academic Partners serve staff and academic personnel
 - HR Partners serve staff
- The **“Data Steward”** who validates all initiated business processes HCM Initiate 2s to make corrections or resolve errors.



AN EFFECTIVE PERSON IN ANY OF THESE ROLES...

- Thoroughly understands how to **initiate business processes** related to HR and payroll in Workday.
- Has a basic understanding of **resolving issues** related to HR and payroll and is aware of **additional resources** to refer to.
- **Shares knowledge** of Workday HR and payroll concepts with colleagues.

REVIEW OF PRE-TRAINING MATERIALS

SUPERVISORY ORGANIZATIONS

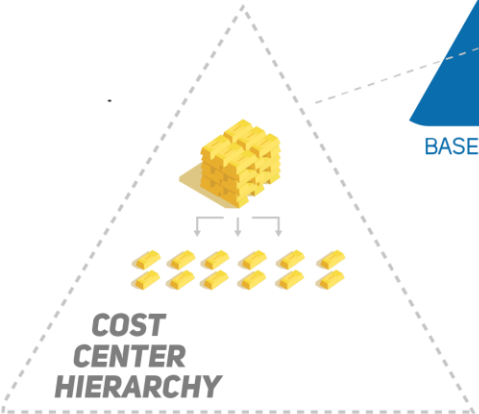
- Supervisory organizations (sup orgs), group employees into a management hierarchy and are a required foundation for Workday
- Sup orgs provide structure for:
 - Organizational hierarchy
 - Routing of business processes
 - Managing staffing
 - Assigning support roles to groups of employees
- Sup orgs are **not** used to manage finances and financial responsibilities. These are addressed primarily through Cost Centers (budgets)

SUPERVISORY ORGANIZATION

WHEN "USER" IS NAVIGATING IN WORKDAY:

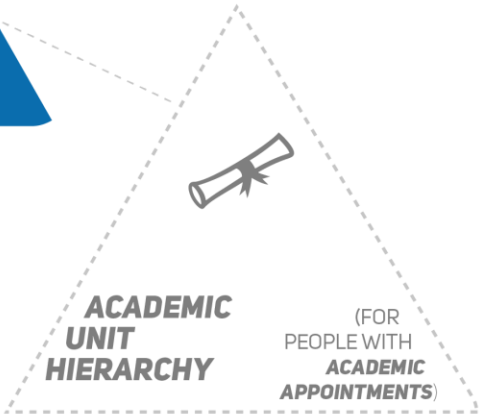


BASED ON REPORTING RELATIONSHIP



BASED ON RELATIONSHIP OF UW BUDGETS*

*UW Budgets are Cost Centers in Workday. The budget number will stay the same.



BASED ON APPOINTMENTS*

*Appointment: A person's academic relationship (found on the Academic tab in Workday).

Note: Appointments in Workday are separate from positions. Academic Appointments track a person's academic relationships, and the characteristics of those relationships, such as start dates, end dates, appointing unit, rank, etc. Academic appointments can be updated in the event of a reappointment or promotion.

STAFFING MODELS AND SUP ORGS

In Workday, every supervisory organization has a staffing model.

There are two types of staffing models:

- Position Management (PM)
- Job Management (JM)

STAFFING MODELS: POSITION MANAGEMENT (PM)

What Makes The PM Staffing Model Useful

- Data, aka the bread and butter of Workday:
 - Track unfilled, filled, closed, and frozen positions
 - Tracks history of position as people come and go while maintaining continuity
 - This data helps sup orgs @ UW plan better for vacancies/filling
- “Setting up” new hires in existing positions is simple and saves the time of having to create a new one each time.
- Hiring restrictions set on position

STAFFING MODELS: JOB MANAGEMENT (JM)

What Makes The JM Staffing Model Useful

- Provides flexibility in hiring by relying on staffing workflows and approvals as opposed to permanent position fills. Funding can also be more flexible as a result.
- Data, aka the bread and butter of Workday:
 - Track and report on filled jobs only
- Less administrative burden on hiring manager, fewer transactions in Workday.
- Hiring restrictions set on the sup org.

STAFFING MODELS: POPULATIONS

Position Management Populations

1. All staff including UW Medical Centers
2. Academic:
 - Indefinite and Multi-Year
 - Librarians
3. Contingent Workers- Managers Only

Job Management Populations

1. Students
2. Academic (short-term):
 - Academic Staff
 - Educators
 - Extension Lecturers
 - Faculty (Annual or Shorter)
 - Medical Residents/Fellows
 - Senior Fellows/Trainees
3. Contingent Workers- Non-Managers

STAFFING MODELS

POPULATIONS

Position Management

- Staff
 - Position, Job Req., & Hire
- Academic (Multi-Year and Indefinite)
 - Position, Hire

Job Management

- Academic (Annual or shorter)
 - Hire
- Students
 - Hire

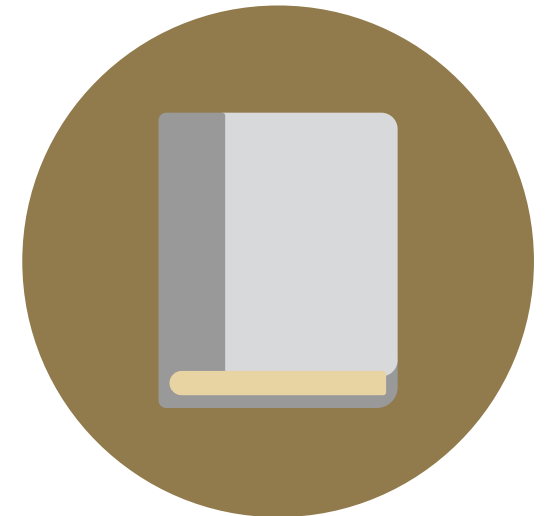
WORKER PROFILE PAGE

OVERVIEW

- The 'Worker Profile' page offers a detailed view of the Worker
 - Tabs/Icons: Overview, Academic (for Workers who have Academic Appointments), Job, Benefits, Compensation, etc.
 - These tabs will vary based on the security role of the Worker being viewed
- Worker 'Actions' menu
 - From the 'Actions' menu, the user can view Worker information, as well as initiate business processes
 - The business processes that can be initiated from the 'Actions' menu will vary/depend on the security role of the user

KNOWLEDGE CHECK

- What is a sup org?
- What are some of the differences between the position management and the job management staffing models?
- What types of information can you find in the 'Worker Profile'?



INITIATING BUSINESS PROCESSES

CREATE POSITION

OVERVIEW

- A Position is created when there is not already an existing one available for one of the following types of employees:
 - Staff Campus
 - Academic Personnel – indefinite and multi-year/librarian
- Requisitions are not used for academic personnel
- Recommended best practice is to first create positions, then requisitions for staff

WORKER TYPES

OVERVIEW AND CONSIDERATIONS

- Employee Sub-Type is assigned to the position, NOT the Worker
- Employees holding more than one position may have multiple Employee Sub-Types
- Employee Sub-Types identify the relationship the employee has with the University
 - Designates between permanent (no anticipated end date) employees and those with limited-term relationships with anticipated end dates
- Employee Type Decision Tree is located on the ISC web site

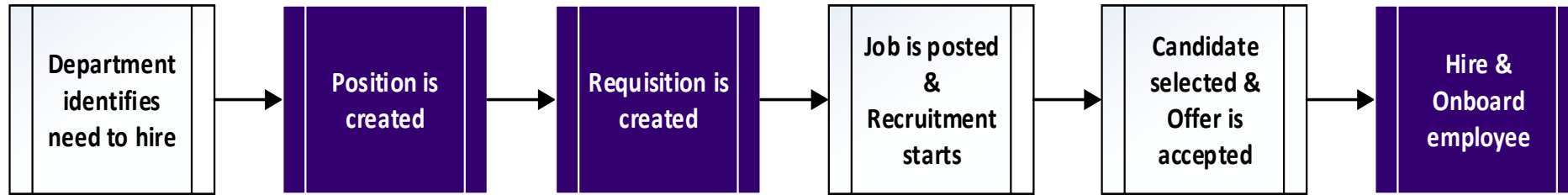
DEMONSTRATION

CREATE POSITION - DIRECTOR

- For staff, in addition to 'Create Position', we will need to also 'Create Job Requisition'. This will be demonstrated later
- Remember: for Position Management staffing models, you will need to 'Create Position'

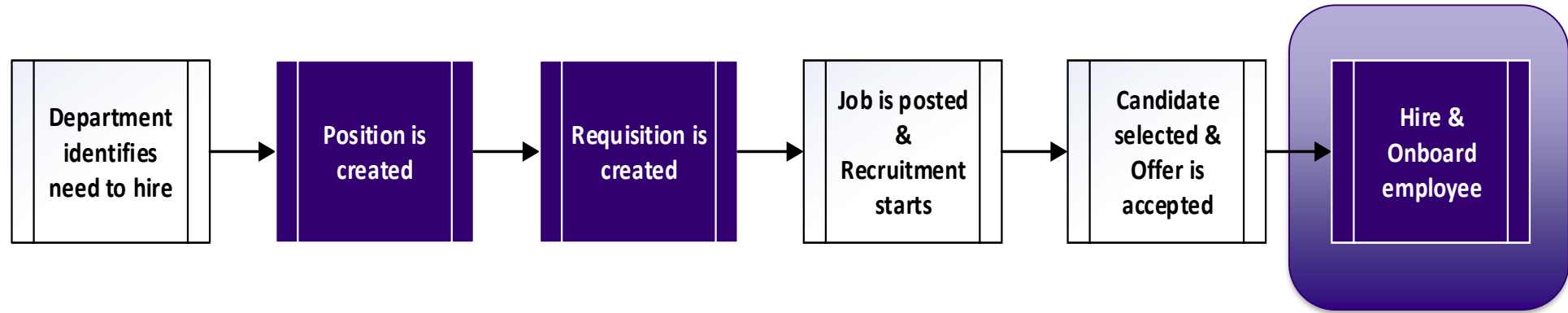


HIRE - STAFF



- Recruiting process in UWHires ensues until a candidate is selected
- Pre check against Person Registry
- Recruiting Office Partner takes steps in UWHires to 'trigger' the 'Hire' back into Workday via an integration

HIRE - STAFF



- The hire details for a recruited Staff employee integrates into Workday from UWHires
- Final check against Person Registry
- Workday account is created and populated with the EID
- The hire process is completed within Workday and will initiate the onboarding process for a new employee

UWHIRES – WHAT'S NEW

- Requisition creation, approvals, and editing will be done in Workday
 - This information will then be integrated into UWHires, where a mirroring requisition will be created and the advertising/recruitment process will take place
- Department Hire (Pre-Hire)
 - This is a new UWHires activity which takes place after a job offer has been extended and accepted
 - When selected, an automatic email to the new hire will be sent. This email will congratulate them on their new job, and will contain a link to the Candidate Hire Portal

UWHIRES – WHAT'S NEW

- Candidate Hire Portal
 - Electronic data collection form
 - Aides in the determination of the hire type (new hire, rehire, rehire from layoff list)
 - Gathers personally identifying information for completing the hire in Workday (i.e., name, date of birth, home address, etc.)
 - This information is also used to conduct the criminal background check when appropriate
 - NOTE: this is a new step in the hiring process, and is critical that the new hire complete in a timely fashion
- Employment specialist adds 'Hire' activity in UWHires
 - Sends hire data to Workday
 - 'Hire' and 'Onboarding' processes then begin in Workday

CREATE JOB REQUISITION

OVERVIEW

- Job requisitions define requirements for filling jobs in the sup org
- Job requisitions are required for integrations between Workday and UWHires, and **must** be completed for all staff hiring
- UWHires posts job announcements and manages applicants, accepted offers, and the finalization of hire details
- Once the recruiting and initial hire steps are completed in UWHires, the new hire record is integrated back into Workday

DEMONSTRATION

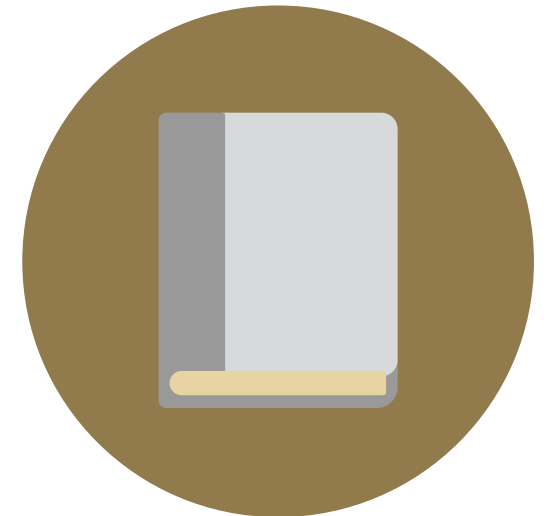
CREATE JOB REQUISITION - DIRECTOR

In session 2, we will complete the 'Hire' business process.



KNOWLEDGE CHECK

- **True or False:** 'Create Position' business process is only necessary in Position Management staffing models.
- Which user roles will receive the approval for the **Hire** in Workday coming from UWHIRES? Who gets it first?
- Bonus: What resource will give you both of the answers above?



REQUEST COMPENSATION CHANGE

OVERVIEW

- Facilitates a compensation change for an employee outside of the annual merit increase
- Two types of changes;
 - Base pay
 - Allowances – i.e., Administrative Supplement for academic personnel, ProStaff (OT exempt), librarians
- Request Compensation Change does **not** include;
 - Compensation above base salary paid on schedule. This is managed by Activity Pay
 - Compensation that is variable and not paid on schedule. This is managed by One-Time Payments

DEMONSTRATION

- Request Compensation Change
 - Base Pay change
 - Ingrade – change in responsibilities
 - 7%



ENTER LEAVE OF ABSENCE

OVERVIEW

- When a Worker is on LOA, their Workday status changes to 'On Leave'
- When a Worker returns from LOA, they need to be returned from leave in Workday
- Workday helps enforce;
 - Worker eligibility
 - Applicable entitlements and/or limits on the amount of leave that can be taken in different situations by different workers
 - Business rules around the administration and approval of LOA

ENTER LEAVE OF ABSENCE

OVERVIEW

- If a Worker has more than one position, a request must be submitted for each position the leave impacts
- Only certain leave types require 'Payroll Time Offs' to be entered;
 - Sick/Injured/Becoming a Parent
 - Cyclic Yearly Leaves
 - Military Unpaid
 - Leave without Pay
 - Unpaid Professional
 - Shared Leaves

DEMONSTRATION

Enter LOA for a staff member

- LOA: Becoming a Parent
- Enter 'Tracking Time Off'



RETURN FROM LOA

OVERVIEW

- Workers must be returned from LOA
- When a worker comes back to work, the HRP/AP must initiate the process to return them from LOA
- If a Worker does not return from LOA, the AP/HRP can run the 'Termination' business process without returning the Worker from LOA

TERMINATIONS

ASSUMPTIONS AND CONSIDERATIONS

- Future-dated terminations are not effective until the date is reached
- Employee will appear as 'Terminated' at midnight of the effective date
- Additional tasks or procedures needed if termination is retro-dated (this should be avoided whenever possible)
- Terminations due to retirement require additional steps to reflect that status and change to benefits

DEMONSTRATION

- Initiate a layoff for a Classified staff member
 - Layoff – Funding
 - Close Position



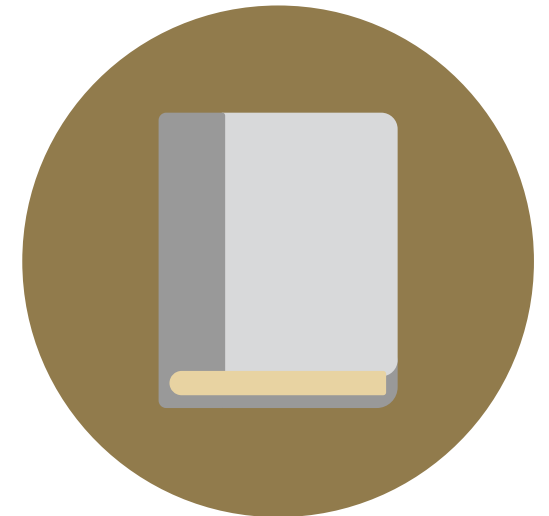
REPORTS

MANAGE FAVORITES

- 'Reports' page on the ISC website
 - Known issues
 - Updates/Enhancements to reports
 - Reports based on security role
 - Submit a ticket if you cannot find a report you are looking for
- Reports can be exported to Excel or PDF
 - If a report is needed to be exported, avoid manipulating the report in Workday, as Workday will export all 'raw data'
 - Any sorting/filtering will not export over to Excel/PDF
 - Exporting a report allows you to share data outside of Workday and its security controls
 - All UW data governance policies still apply

KNOWLEDGE CHECK

- What are some examples for a 'Request Compensation Change'?
- What types of LOA will require 'Tracking Time Off'?
- **True or False:** When a Worker returns from LOA, you must also follow the 'Return Worker from Leave' business process.
- What are some scenarios when completing a termination business process that will also require closing the position?



NEXT STEPS

SESSION 2

HCM INITIATE 2/ACADEMIC PARTNER - or - HR PARTNER

- Register for Session 2 if you have not already
- Upon successful completion of the assessment, appropriate security role will be assigned
- HCM Initiate 2/Academic Partner
 - Additional business processes with focus on academic personnel
- HR Partner
 - Additional business processes with focus on staff
- Both classes will also include business processes for students