WORKDAY FUNDAMENTALS:
HCM Initiate 2, HR Partners, & Academic Partners

Session 1

UNIVERSITY of WASHINGTON
INTEGRATED SERVICE CENTER
YOUR INSTRUCTOR(S) AND TRAINING

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Need to get in contact with us?
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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

Learning Retention
...critical to performance in WORK CONTEXT

INFORMAL LEARNING
Performer Support Impact

Classroom Learning Retention

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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:

SUPervisory ORGANIZATION HIERARCHY

BASED ON REPORTING RELATIONSHIP

COST CENTER HIERARCHY

BASED ON RELATIONSHIP OF UW BUDGETS*

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

ACADEMIC UNIT HIERARCHY

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.
In Workday, every supervisory organization has a staffing model.

The 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
• 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
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
ABSENCE OVERVIEW – WORKERS ON LEAVE

- Workers on Leave can have up to 3 different entry types on their Absence Calendar
- **Leave** Types
  - Typically entered by Employee or HR/Academic Partner
  - Designation only, no impact to Payroll* Excluding Sabbatical and Summer Hiatus
  - Begin with LOA in the title
  - Example: LOA – General Request- Sick/Injured Leave
- **Time Off** Types
  - Entered by Employee (or Time & Absence Initiate)
  - Passed to Payroll
  - Examples: Vacation Time Off, Sick Time Off, Unpaid Time Off
- **Tracking Time Off** Types
  - Entered by HR/Academic Partner to track entitlements
  - Begin with Tracking in the title
  - Examples: Tracking Time Off-Parental, Tracking Time Off-FMLA, Tracking Time Off- Disability
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