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

Session 1

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

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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
  – Hires
  – 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
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.
WORKDAY CONCEPTS AND INTRODUCTION
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:

COST CENTER HIERARCHY
BASED ON RELATIONSHIP OF UW BUDGETS*

SUPERVISORY ORGANIZATION HIERARCHY
BASED ON REPORTING RELATIONSHIP

ACADEMIC UNIT HIERARCHY
FOR PEOPLE WITH ACADEMIC 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.

* UW Budgets are Cost Centers in Workday. The budget number will stay the same.
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
- Positions can be created independently or as part of the requisition for staff
- 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
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
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.
• At what point in the hiring process is the ‘Pre-Hire’ record created?
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
• 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