

# Workday Employee Guide

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## Accessing Workday

To access Workday from the HSHS network:

1. Click on the following link: [myworkday.com/hshs](https://myworkday.com/hshs)
2. Click SSO to be signed in automatically with Single Sign On.

### NON-EXEMPT COLLEAGUES ACKNOWLEDGMENT

By logging in, I acknowledge that I have read and understand the following statement: All non-exempt colleagues who perform work outside of normal working hours must obtain supervisory approval to do so, and record all working time within API Time and Attendance.

### Accessing Workday Outside the HSHS Network

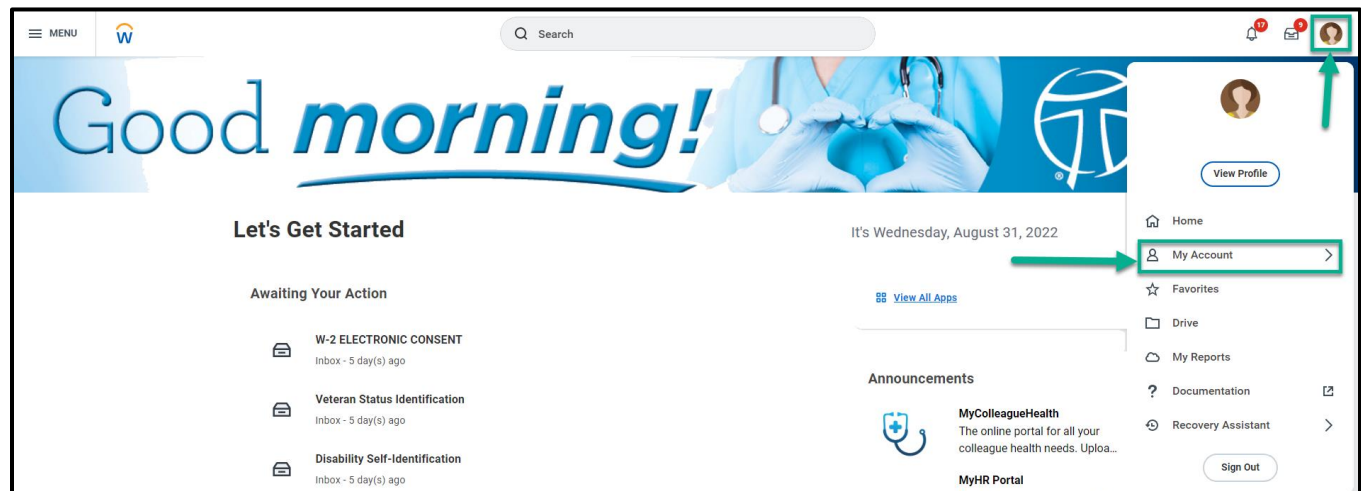
From your home computer or other device:

1. Go to [myworkday.com/hshs](https://myworkday.com/hshs)
2. Click **Login with Username and Password**.
3. Enter your Network login ID and password and click **Sign In**. You will get an alert from your Imprivata app to approve. Once approved, your Workday Homepage will appear.

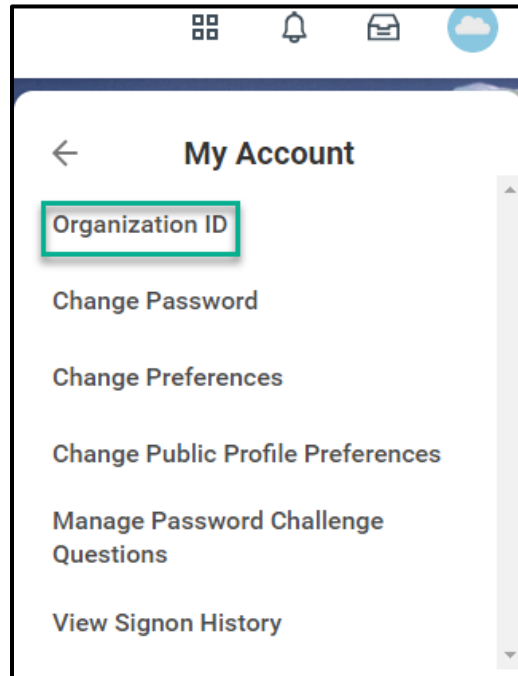
### Downloading the Workday Mobile App

To download the mobile app:

1. Go to your Workday homepage on a computer.
2. Click on your profile icon in the right-hand corner of the screen.



3. Click on **My Account**.
4. Under the **My Account** options, click on **Organization ID**.

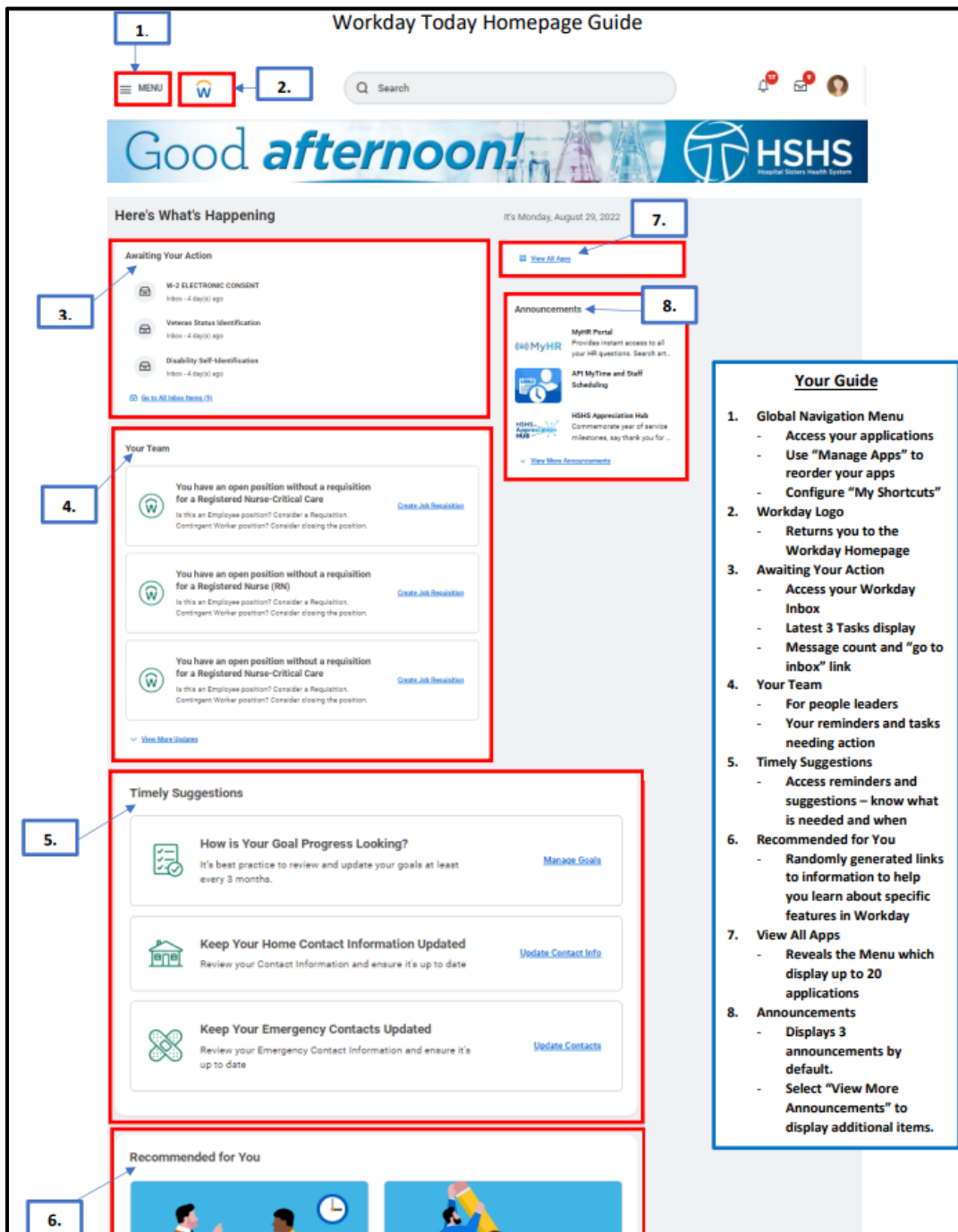


5. Scan the QR code shown on the **Access Workday on the go** screen to download the Workday app. The QR code should take you to the App Store or Google Play to download the app.
6. Once the app has downloaded, open the app and notice that you should be connected to the HSHS Workday tenant.
7. Click **Login with Username and Password**.
8. Enter your Network login ID and password and click **Sign In**. You will get an alert from your Imprivata app to approve. Once approved, your Workday Homepage will appear.
9. You will be prompted to enter a passcode to make signing in with the app easier in the future.

## Home Page

As a worker, your home page provides relevant tasks, applications, announcements, along with information and recommendations – personalized to you.

**Workday Today Homepage Guide**



The screenshot shows the Workday Today Homepage with the following numbered callouts:

- 1.** Points to the **MENU** button in the top navigation bar.
- 2.** Points to the **Workday Logo** in the top navigation bar.
- 3.** Points to the **Awaiting Your Action** section, which lists items like "W-2 ELECTRONIC CONSENT" and "Veteran Status Identification".
- 4.** Points to the **Your Team** section, which displays open positions without requisitions for Registered Nurse-Critical Care and Registered Nurse (RN).
- 5.** Points to the **Timely Suggestions** section, which includes prompts like "How is Your Goal Progress Looking?", "Keep Your Home Contact Information Updated", and "Keep Your Emergency Contacts Updated".
- 6.** Points to the **Recommended for You** section at the bottom of the page.
- 7.** Points to the **View All Apps** link in the top right corner.
- 8.** Points to the **Announcements** section, which includes "MyHR Portal" and "API MyTime and Staff Scheduling".

**Your Guide**

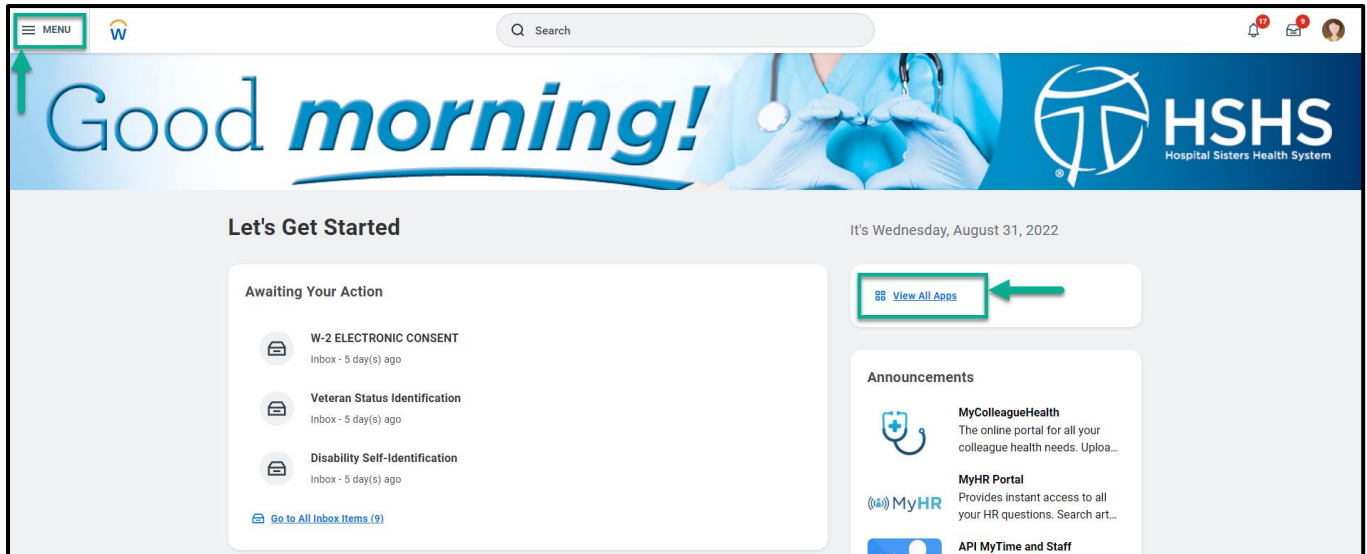
- Global Navigation Menu**
  - Access your applications
  - Use "Manage Apps" to reorder your apps
  - Configure "My Shortcuts"
- Workday Logo**
  - Returns you to the Workday Homepage
- Awaiting Your Action**
  - Access your Workday Inbox
  - Latest 3 Tasks display
  - Message count and "go to inbox" link
- Your Team**
  - For people leaders
  - Your reminders and tasks needing action
- Timely Suggestions**
  - Access reminders and suggestions – know what is needed and when
- Recommended for You**
  - Randomly generated links to information to help you learn about specific features in Workday
- View All Apps**
  - Reveals the Menu which display up to 20 applications
- Announcements**
  - Displays 3 announcements by default.
  - Select "View More Announcements" to display additional items.

## Managing Apps on Your Home Page

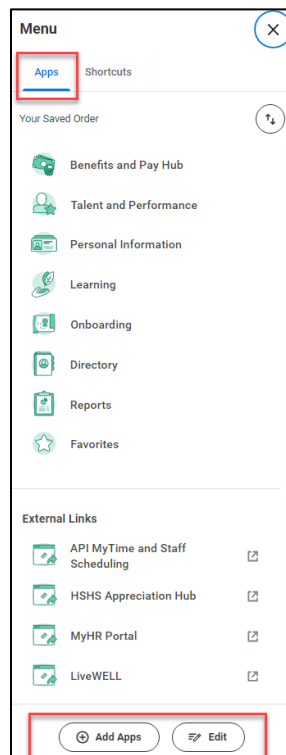
There is space for up to 20 Workday apps on the Workday home page. Based on security, some apps are required and cannot be removed. You can add, remove, or reorder any optional apps.

From your Workday home page:

1. Click **Menu** or **View All Apps**.



2. From the menu panel, you can view your list of applications, add apps, or edit the order of the apps in your list.



3. Click on **Add Apps** or **Edit** to make changes:
  - Click on the **Add Apps** button to search for an app to add to your list of optional apps.
  - Click **Edit** to order the apps higher or lower in the list with drag and drop. Any optional apps will always be visible after the last required app.
4. Click **X** when finished. The optional app(s) will appear in your **Menu**.

## Return to Home Page

You can return to the home page from any page by clicking the Workday logo in the top left corner of the screen.

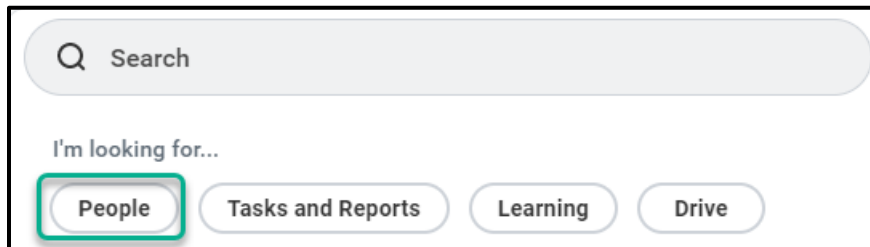
## Search

### Search for a Task

1. Click in the **Search Bar** located at the top middle of the screen.
2. Start typing the name of the task you wish to view. Search results will begin to appear as you type.
3. Click on the task you want to view.

### Search for a Worker

1. Click inside the **Search Bar** located at the top middle of the screen.
2. Click on the “People” button under the “I’m looking for...” section in the search bar to narrow your search to workers only. Type the beginning of a worker’s name. As you type, search results will appear.



**Note:** You only need to type 3 letters of a worker’s first and last name to see search results. For example, if searching for Abraham Lincoln, you would only need to type “abr lin” for Abraham’s profile to appear.



**Note:** You can use a worker’s **Preferred Name** or **Legal Name** when searching. If the worker’s **Preferred Name** is different from their **Legal Name** in Workday, you must press **ENTER** to see their worker profile in the results.

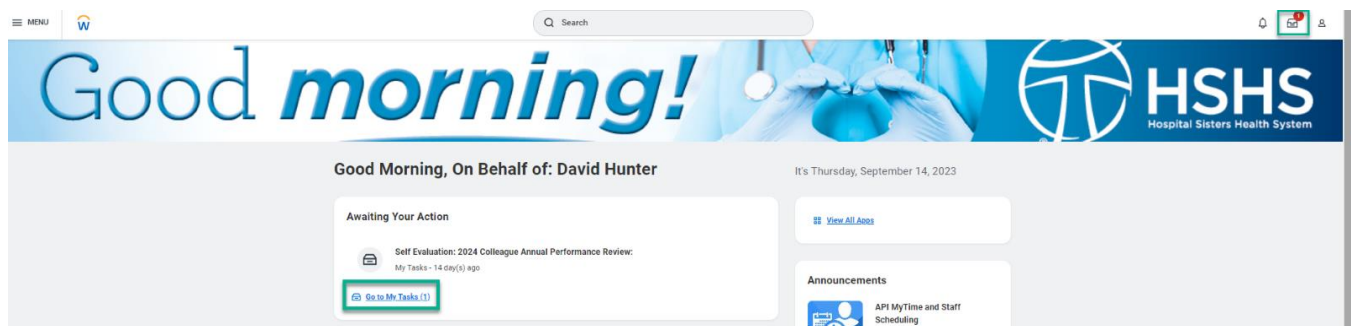
## Find Workers

1. Click in the **Search Bar** located at the top middle of the screen.
2. Type **Find Workers**, press **ENTER**. Click on the **Find Workers** report.
3. Use the filters on the left side of the screen to narrow down your search result.

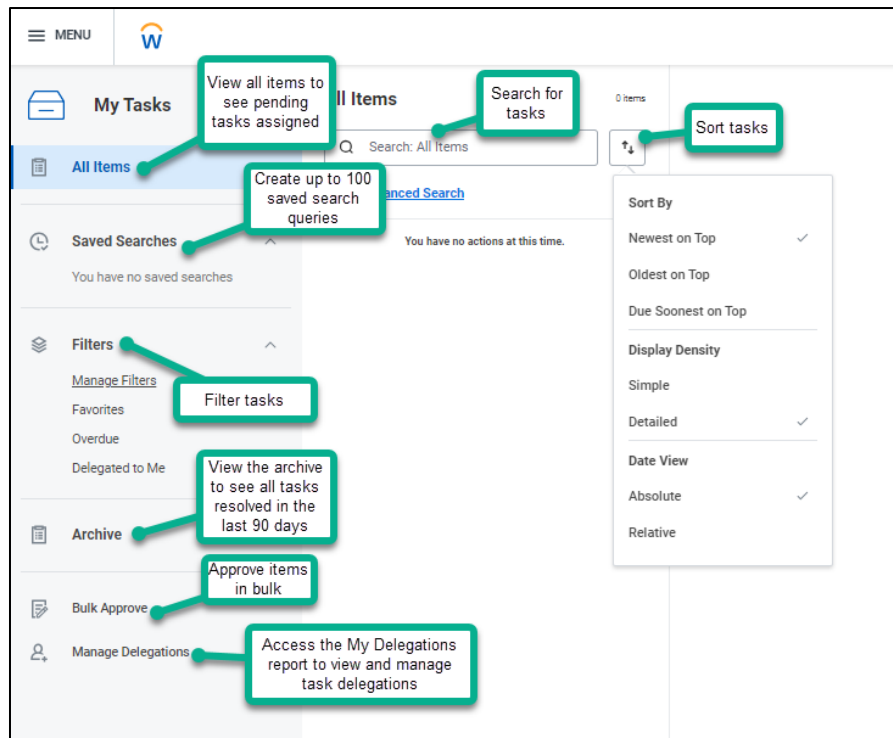
Note: Data on the **Find Workers** report cannot be exported to Excel.

## Navigating My Tasks

1. To get started, from your Workday homepage you can click on the **Go to My Tasks** link in the main **Awaiting Your Action** section on the left-hand side of the screen or on the **My Tasks** icon in the top right-hand corner of the screen.



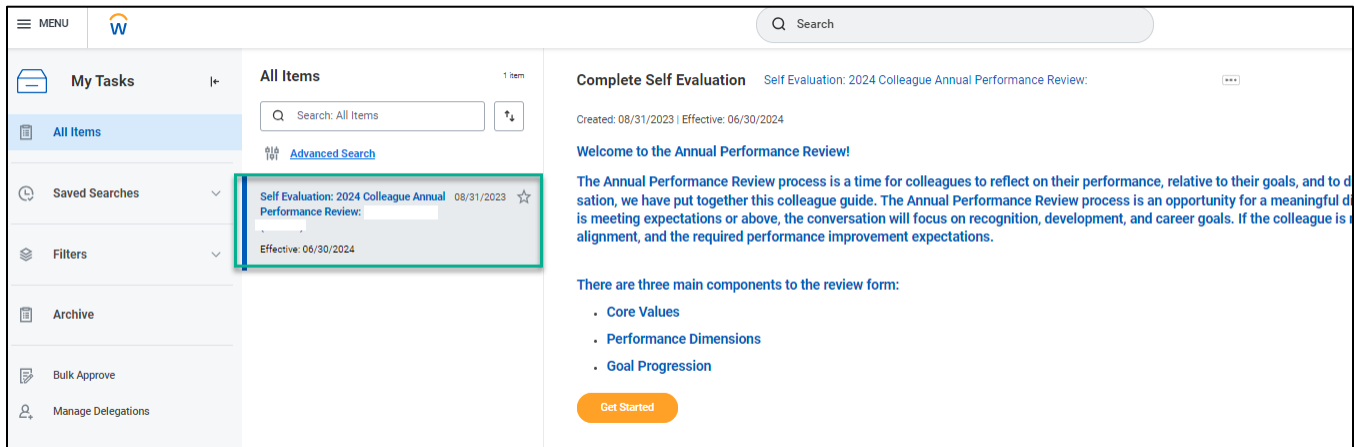
2. My Tasks streamlines the user interface and enables users to easily filter, sort and search for their tasks





## Managing Your My Tasks

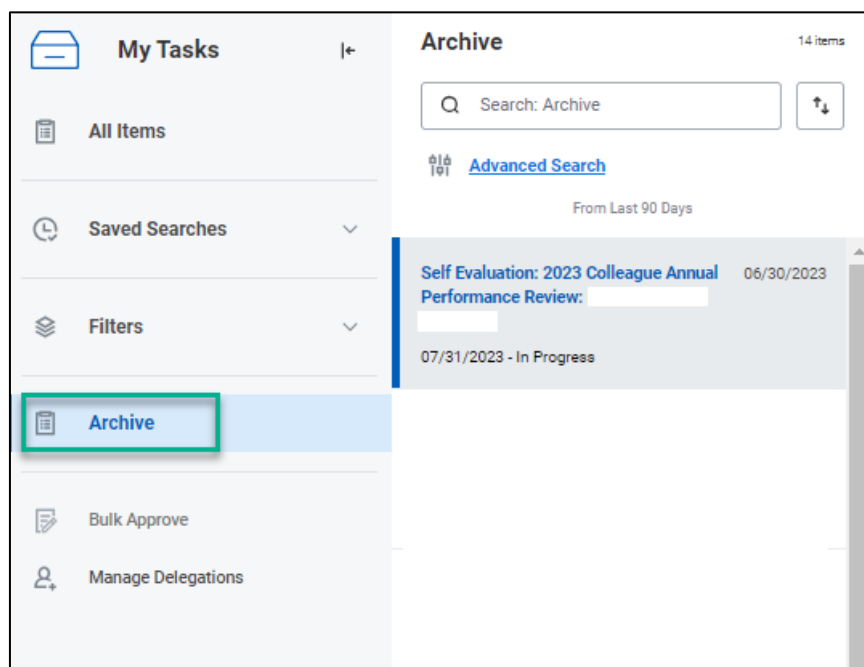
- To view and complete a task, click on the task in **All Items**. The task will open on the right-hand side of the screen.



- When you open a task, instructions on starting and completing the task will appear on screen.

## Managing Your Archive

- As mentioned above, once you complete a task in **All Items**, the task will be moved to the **Archive** for your records. To see your archived tasks, click the **Archive** tab on the left menu.



2. Similar to **All Items**, you can click on an archived task to view it. The task will open up on the right-hand side of the screen and you can click the arrows on the upper right-hand side of the page to expand the screen for easier viewing.




**Note:** All inbox items should be completed daily.

## Notifications

Notifications alert you when a task has been completed, approved, denied, rescinded, or canceled. Notifications do not require any action.



1. Click **Notifications**  in the upper right corner. All notifications will appear on the left side of the screen.
2. To reduce the number of notifications, click on the circle to the right of each notification to “Mark Read”. Notifications will only be visible for 30 days.
3. Use the **Viewing** or **Sort By** options to filter notifications.

## Navigating Workday

### Hyperlinks

Within Workday, you will see **blue hyperlinks**. When you click a hyperlink, you will be directed to another page within Workday related to the hyperlink. You can always click **BACK** on your browser to go back to the previous page.




**Note:** Use CTRL + Click on a blue hyperlink to open a new tab instead of overlaying your current tab.





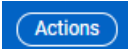









### Shortcuts

1. Click the **Menu** icon in the top-left corner of your screen.
2. Click on the **Shortcuts** tab.
3. AT the bottom of the **Shortcuts** tab, click **Add Shortcut** to add an additional shortcut to your list.
1. Now when clicking the **Shortcuts** tab, any shortcuts you have configured will appear in the list.
2. You can also set the order of shortcuts in your list. At the bottom of the **Shortcuts** tab, click **Edit** to order the shortcuts higher or lower in the list with drag and drop.
3. Click **Save Changes**.



**Note:** To remove a **Shortcut**, click the Edit button in the Shortcut Menu and click the  button next to the shortcut you wish to remove.

## Workday Icons

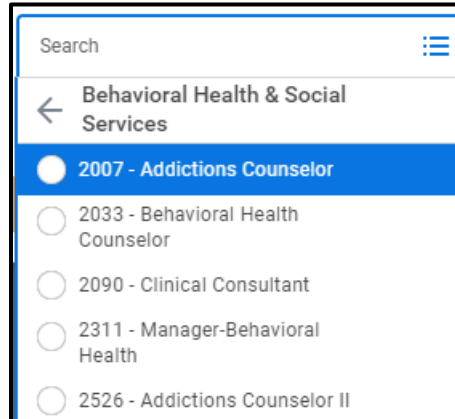
Icon	Description
	This icon in the upper left corner will always take you to the Workday home screen.
	Your picture (or the cloud if you do not have a picture) in the upper right corner will take you to your worker profile.
	Under the picture on a worker profile, you can select the Team icon to view the organization structure.
	<b>Related Actions:</b> View additional menu options related to the name or task.
	
	Indicates a REQUIRED field.
	Filter data on reports.
	Use this icon to modify previous selections in a task or report.
Turn on the new tables view 	Toggle to enhance a table of data. Eliminates the need to scroll.
	Export to PDF.
	Export to Excel.
	Toggle full screen viewing mode.
	
	This option will appear when running a large report. Clicking Notify Me Later will allow the report to run in the background. Once the report has completed processing, a <b>Notification</b> will appear in the upper right corner to indicate that the document is available.

## Drop-Down Lists

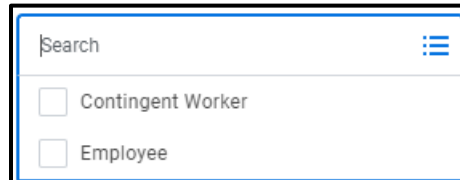
### Multiple Select vs. Single Select

When presented with a drop-down list, lists will have either circle or square icons.

- Circle icons indicate a Single Select field. This means that only one icon can be selected at a time.

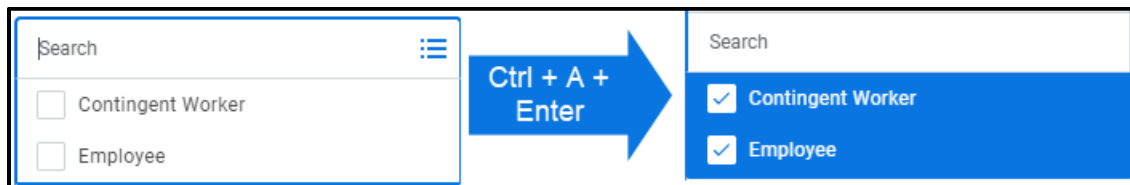


- Square icons indicate a Multiple Select field. This means that multiple selections can be made for the same field.



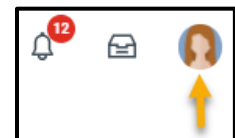
### Select All

When presented with a Multiple Select drop-down list, you can select all options by pressing **Ctrl + A + Enter** keys.



## My Profile

Your Profile contains details about your Job, Compensation, Benefits, Personal Information, etc.

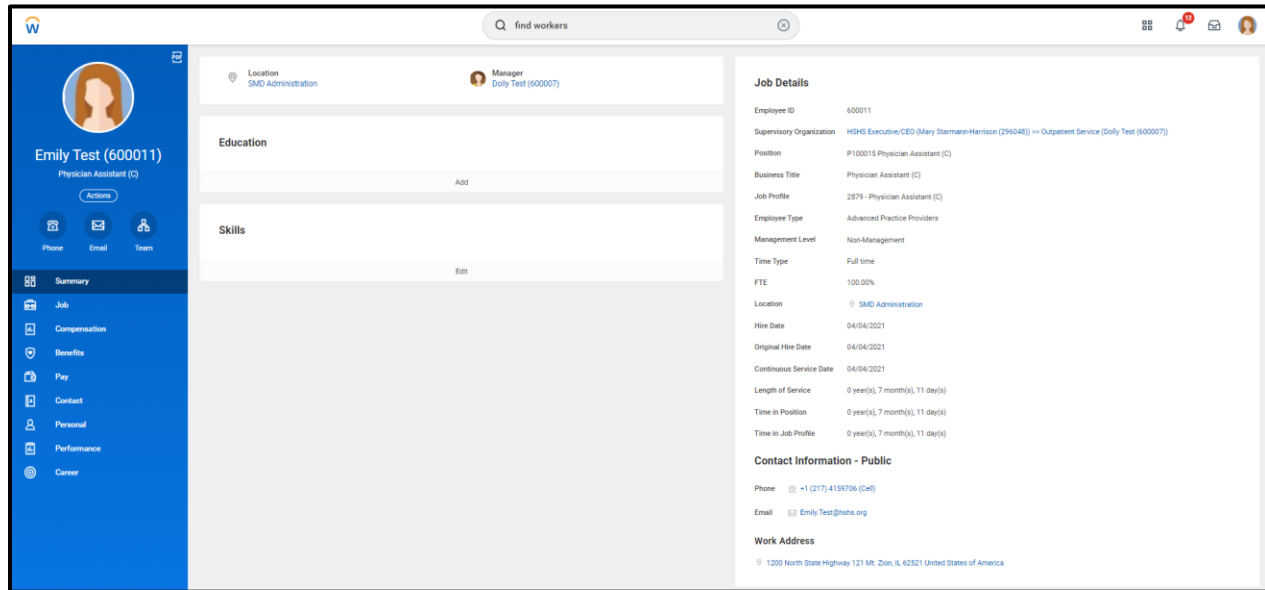


1. Click the Cloud or your photo in the upper right corner.



**Note:** When you upload a photo of yourself it replaces the cloud icon.

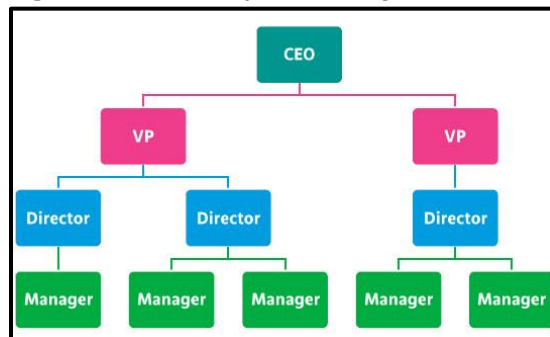
2. Click **View Profile**. A summary of your Job Details and Public Contact Information will appear:



- Click the tabs on the left side of the screen to view details.

## View Org Chart

From your profile, click your **Team** icon. Your Org Chart will appear showing your supervisory organization. A **Supervisory Organization** is any leader's group of colleagues that report up to them.



- Scroll up or down to view the next level in the hierarchy.
- Click a worker's box to view their contact information.
- Point your mouse in the upper right corner of the org chart to view the leadership chain.

## View Job Details

From your profile:

- Select the **Job** tab and view the **Job Details** tab.
- The **Job Details** tab contains important job information such as but not limited to your employee ID, job profile, time type, FTE, location, dates of employment, and length of service.

## View Compensation

From your profile:

- Select the **Compensation** tab.
- The **Compensation** tab contains information related to your hourly rate, pay range and compensation changes.

## View Benefits

From your profile:

1. Select the **Benefits** tab.
2. The **Benefits** tab contains information related to your benefits plan, retirement, dependents, and beneficiaries.

## View Pay

From your profile:

1. Select the **Pay** tab.
2. The **Pay** tab contains information related to your tax elections, payment elections, payslips, tax documents, and voluntary deductions.

## View Contact Information

From your profile:

1. Select the **Contact** tab.
2. The **Contact** tab contains your home and work contact information (such as email, phone number, and address) and your emergency contacts.

## View Personal Information

From your profile:

1. Select the **Personal** tab.
2. The **Personal** tab contains personal information (such as gender, date of birth, age, marital status, and ethnicity), legal and preferred names, social security number, and uploaded documents.

## View Performance

From your profile:

1. Select the **Performance** tab.
2. The **Performance** tab contains your individual goals and performance reviews.



**Note:** Your performance information will appear beginning with the performance review in 2022.

## View Career


From your profile:

1. Select the **Career** tab.
2. The **Career** tab contains your certifications, professional profile, education, career interests, job interests, skills, work experience, job history, languages, learning, relocation preferences, and travel preferences.




**Note:** The career tab serves as your personal resume within Workday. Most of the information on the Career tab will not be entered, but feel free to update with your information if desired. You will not be able to enter your own certifications.

## Updating My Veteran Status

1. Click the Cloud or your photo in the upper right corner.
2. Click **View Profile**.
3. Click the  button below your name on the left side of the screen. Hover over the **Personal Data** section and click **Change My Veteran Status Identification**.
4. Click in the **Veteran Status** drop-down menu and select a status.
5. If applicable, check the boxes under the **Select all that apply** section.
6. Enter any relevant comments in the comments box.
7. Click **Submit**.

## Updating My Self Identification of Disability

1. Click the Cloud or your photo in the upper right corner.
2. Click **View Profile**.
3. Click the  button below your name on the left side of the screen. Hover over the **Personal Data** section and click **Change Self Identification of Disability**.
4. Fill out the form if applicable.
5. Enter any relevant comments in the comments box.
6. Click **Submit**. Your submission will go to HR for review.

## Updating My Social Security Number

From your profile:

1. Select the **Personal** tab and view the **IDs** tab.
2. Click **Edit > Change My Government IDs**.
3. Your current ID will appear as XXX-XX-XXXX for security reasons.
4. In the **Add/Edit ID** column, type your full **Social Security Number** (SSN). Leave the **Issued Date** and **Expiration Date** fields blank.
5. On the far right, place a check in the **Set Verification to Current User** box.
6. Click **Submit**. Up next in the approval process: HR. Your new Social Security Number will be reflected after it has been approved.

## Personal Information App

### Updating My Contact Information

From the Workday home page:

1. Click **Menu**.
2. Select the **Personal Information** application in the **Applications** tab.
3. Select **Contact Information** in the **Change** box.
4. Click **Edit**.
5. Click in the individual boxes to make the appropriate changes to any of the following categories:
  - a. Home Address, phone number, and email.
6. Click **Submit**.



**Note:** You are not able to update your work contact information or address.





**Note:** If you are a remote colleague changing your address to a new state, once approved by HR, you will receive a To Do step in your Workday Inbox to Complete State and Local Withholding Elections.



**Note:** If you are a non-remote colleague changing your address to a new state, consider changing your State and Local Withholding Elections.

## Updating My Personal Information

From the Workday home page:

1. Click **Menu**.
2. Select the **Personal Information** application in the **Applications** tab.
3. Select **Personal Information** in the **Change** box.
4. Click in the individual boxes to make the appropriate changes to any of the following categories:
  - a. Gender, Date of Birth, Marital Status, Race/Ethnicity, Nationality, Pronouns, Military Service.
5. Click **Submit**.

## Updating My Emergency Contacts

From the Workday home page:

1. Click **Menu**.
2. Select the **Personal Information** application in the **Applications** tab.
3. Select **Emergency Contacts** in the **Change** box.
4. Click **Edit**.
5. Click in the individual boxes to make the appropriate changes to any of the following categories:
  - a. Legal Name, Relationship, Preferred Language
6. Click on the **Add** buttons to add in the optional fields:
  - a. Primary Address, Primary Phone, Additional Phone, Primary Email, etc.
7. Click **Submit**.

## Updating My Photo

From the Workday home page:

1. Click **Menu**.
2. Select the **Personal Information** application in the **Applications** tab.
3. Select **Photo** in the **Change** box.
4. Click **Select Files** and navigate to the folder where your picture is saved.
5. Double-click on your photo and resize, if necessary. Click **OK**.
6. Click **Submit**. Your photo will appear in place of the cloud or your previous photo within a few minutes or the next time you log in.



**Note:** All photos should be professional. Any photo uploaded to Workday should be appropriate for a security badge.

## Updating My Legal Name

From the Workday home page:

1. Click **Menu**.
2. Select the **Personal Information** application in the **Applications** tab.
3. Select **Legal Name** in the **Change** box.
4. Fill out the required fields.
5. Click **Select Files** and navigate to the folder where your Legal Name Change documentation is saved.
6. Double-click on the file.
7. Click **Submit**.

## Updating My Preferred Name

From the Workday home page:

1. Click **Menu**.
2. Select the **Personal Information** application in the **Applications** tab.
3. Select **Preferred Name** in the **Change** box.
4. Deselect the **Use Legal Name As Preferred Name** box.
5. Fill out the required fields.
6. Click **Submit**.

## Updating My Social Networks

From the Workday home page:

1. Click **Menu**.
2. Select the **Personal Information** application in the **Applications** tab.
3. Select **Social Networks** in the **Change** box.
4. Click **Add Social Network Account**.
5. Fill in the web address to your LinkedIn account.
6. Click **OK**.



**Note:** LinkedIn is the only social network that can be added.

## View

From the Workday home page:

1. Click **Menu**.
2. Select the **Personal Information** application in the **Applications** tab.
3. Under the **View** section – select the appropriate box to view the pertinent information on file.

## Benefits and Pay Hub

### Update Withholding Elections


From the Workday home page:

1. Click **Menu**.
2. Select the **Benefits and Pay Hub** in the **Applications** tab.
3. Select the **Pay** tab and then the **Tax** tab to view your tax elections.

4. To update Federal Elections scroll to **Tax Elections** section:
  - a. Click **Update** > Click **OK**.
  - b. Update your Federal Withholding.
  - c. Click **OK**.
5. To update State and Local Elections scroll to **Tax Elections** section:
  - a. Click **Update** > Click **OK**.
  - b. Update your State & Local Withholding.
  - c. Click **OK**.

## Update Payment Elections

From the Workday home page:

1. Click **Menu**.
2. Select the **Benefits and Pay Hub** in the **Applications** tab.
3. Select **Pay** tab and then **Payments** tab and scroll down to **Payment Elections** section.
4. To edit an existing bank account, click the **Edit** button next to the account you would like to change in the **Accounts** table.
  - a. Update your account information as needed.
  - b. Click **OK**.
5. To remove bank account, click the **Remove** button  next to the account you would like to remove in the **Accounts** table.
  - a. Review the Bank Account and click **OK**.
6. To add a bank account, click the **Add** button above the **Accounts** table.
  - a. Enter your bank account's information.
  - b. Click **OK**.



**Note:** Once you add or edit an account, make sure you update your Payment Elections to ensure your payment is routed to the correct bank account.



**Note:** Once you click the **Edit** or **Add** button, you will receive a notice that you must enter a privileged session and provide additional authentication. You will be prompted to sign in again. You will have 5 minutes to make changes before being timed out. You can extend the privileged session if needed by clicking Extend in the Privileged Session Expiration pop-up.

## View Payslips

From the Workday home page:

1. Click **Menu**.
2. Select the **Benefits and Pay Hub** in the **Applications** tab.
3. Select **Pay** tab and then select **Payments** and scroll down to **All Payslips** section.
4. In the **All Payslips** section, you can view all your past payslips available in Workday. You can also print one or more payslips from this page.

## View My Tax Documents

From the Workday home page:

1. Click **Menu**.
2. Select the **Benefits and Pay Hub** in the **Applications** tab.
3. Select the **Pay** tab and then the **Tax** tab.
4. In the **All Tax Documents** section, you can view all your W2 tax forms available in Workday. You can also print one or more tax forms from this page.


## View Bonus & One-Time Payment History

From the Workday home page:

1. Click **Menu**.
2. Select the **Benefits and Pay Hub** in the **Applications** tab.
3. Select **Overview** Tab
4. Scroll to **Bonus & One-Time Payments** section.

## Submit Resignation

From the Workday home page:

1. Click the Cloud or your photo in the upper right corner.
2. Click **View Profile**.
3. Click the  button below your name on the left side of the screen. Hover over the **Job Change** section and click **Resign**.
4. On the Submit Resignation screen:
  - a. Enter the **Proposed Termination Date**. This should be the last date you will physically work.
  - b. Enter the **Primary Reason** for the resignation.
  - c. **Secondary Reasons** are not applicable.
  - d. Please enter any relevant comments surrounding the nature of the resignation in the comments box at the bottom of the screen.
  - e. If you are providing a resignation letter, please attach it in the **Attachments** section at the bottom of the screen.
    - i. If you are adding an attachment, please enter a description and choose the **Resignation Letter** category.
  - f. Click **Submit**. The resignation will be routed to your manager for notification.
5. Please refer to the MyHR Employee Portal for Offboarding articles.



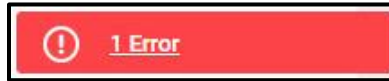
**Note:** If you click **Save for Later**, you can return to your Workday Inbox, locate the task, and click **Submit** at any time. Or, if you no longer want to make the change, click the Gear icon in the top-right corner of the task and select **Delete Incomplete**, then click OK. The task will be deleted.

## Appendix

### Errors / Alerts

When you receive an Error or Alert pop-up, click on the pop-up to view details.

- Red error messages indicate the task cannot be completed until you fix the error:



- Orange alert messages notify you of important information but do not prevent you from completing the task:



## Tracking Your Request

### Tracking by Business Process

After clicking **Submit**, the business process you initiated is saved in your Workday Inbox under the **Archive** tab.

1. In your Workday Inbox, click **Archive**. Then click the request you want to track.
2. Locate and click the **Process** tab.
3. Review the **Status** column to determine which steps are awaiting action and by whom.