Workday Quick Tips for Leaders

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All Colleagues Must Update Their Own Personal Information

HR cannot make self-service changes (updating contact information, personal information, etc.) on behalf of colleagues. All colleagues must update their own information including:

Personal Information – legal name, preferred name, SSN, etc.
Home contact information
Emergency contacts
Federal and State Tax Withholding Elections
Payment Elections (e.g. Direct Deposit)

Every colleague is responsible for ensuring that their personal information, direct deposit, and tax elections in Workday are correct. There are many reasons to make sure the information listed in Workday is accurate. A missing or incorrect address could put colleagues at risk for not receiving their paycheck or tax documents on time, being offered the wrong benefits options, or even being taxed incorrectly.

Please refer to MyHR if you or your colleagues need assistance or instructions.

Onboarding your Colleagues

When colleagues begin their employment with HSHS they are automatically assigned a series of onboarding tasks to complete in Workday. Your assistance is needed to help colleagues with finding

the time during their first week of employment to complete these items as a part of their onboarding. It is very important that these items are completed in advance of their first payroll cycle to prevent them from defaulting into basic tax elections, and to ensure they receive their paycheck via direct deposit versus a paper check.

Important Note - Colleagues can only enroll and make changes to their direct deposit, tax withholdings, and benefit elections online. For security purposes, these actions cannot be completed in the Workday Mobile App.

- Review/Update Contact Information
- Review/Update Personal Information
- Disability Self-Identification
- Veteran Status Identification
- Review Documents
- Emergency Contacts
- Federal & State Withholding Elections
- Benefit Elections
- Manage Payment Elections (Direct Deposit)

Entering Terminations to begin the Backfill Process

Did you know you can enter future termination dates in Workday? When a colleague gives their notice or has an upcoming retirement, you can go ahead and enter the termination with a future date. This lets Workday know that the position will be vacated in the future, and that it's ok to start the recruiting process now. To accomplish this, during the termination process in Workday be sure the "Close Position" question is set to **No**, and the "Is the position available for overlap" question is set to **Yes.** These questions will default to these settings, so no action is needed to set them this way. Following these steps allows you to start the recruiting process sooner, even before the terminating colleague vacates their position.

IMPORTANT NOTE: If you do not intend to backfill the vacant position (now or in the future), you will instead set the "Close Position" question to **Yes**. This permanently closes the position, and it can never be reinstated for use. Closed positions cannot be reopened.

Initiating the Backfill Process

Once the termination has been entered for the prior colleague, even if future dated, you can start the backfill process. To get started, search "Create a Job Requisition" in Workday. The requisition will default under your own Supervisory Organization (your own team), but you can select subordinate Supervisory Orgs if you have them. Then select the "for Existing Position" option. Choose the departing colleague's position from the dropdown menu. You will see the vacate date listed alongside the colleague if it is a future dated termination. On the next "Recruiting Information" screen select **Budgeted Replacement** from the "Reason" dropdown menu, and select the departing colleague's name from the "Replacement For" drop down menu. The "Recruiting Start Date" and the "Target Hire Date" dates should always be today's date (the date you are completing the Req). Continue through the remaining steps to create the requisition.

After all required workflow approvals have occurred in Workday, the requisition will flow over to iCIMS.

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Colleague requests to move to PRN

Is one of your colleagues asking to move to PRN? You must first determine if you plan to backfill the colleague's regular position to determine the next course of action.

Backfill - If you plan to backfill the current position the colleague is holding as a Full Time/Part Time colleague, *do not* submit a job change. Instead you must request a new PRN position be created to move the colleague into. New PRN positions must be approved at Position Review Committee. Once you receive approval for your new PRN chair/position, you may submit the job change and transfer your colleague into the new position. Then you can open a requisition on the initial, regular position to be backfilled.

The new PRN position can be initiated by searching "Create a Job Requisition" in Workday. The requisition will default under your own Supervisory Organization (your own team), but you can select subordinate Supervisory Orgs if you have them. Then select the "Create New Position" option. On the next "Recruiting Information" screen select **Create PRN Position for HSHS Colleague - Internal Fill Only** from the "Reason" dropdown menu. In this case, because this is a new position, there is no "Replacement For" to be selected. The "Recruiting Start Date" and the "Target Hire Date" dates should always be today's date (the date you are completing the Req). Continue through the remaining steps to create the requisition.

After all required workflow approvals have occurred in Workday, the requisition will flow over to iCIMS and will be presented to the Position Review Committee for approval. You will be notified of the status. If approved, you may submit the job change and transfer your colleague into the new position.

No backfill - If you don't plan to backfill the current regular position the colleague is holding, now or at any time in the future, and you want to make the position PRN on a permanent basis, you can simply submit a job change to change the status of the current position the colleague is currently holding to PRN with zero standard weekly hours.

Transferring Colleagues to another position on your Team

Remember, managers can only move colleagues into vacant non-competitive (same position-type, same leader, same department) positions. These are positions that do not have a Requisition open on them. If there is a Req open on the position, TA handles the colleague movement by filling the req (moves into jobs that have been posted on the career site). If a manager tries to move a colleague into a position that has an open requisition, this does not fill the req, but instead causes unexpected and unintended results that must be fixed administratively. In summary, do not open a Req on position and then transfer a colleague into the same position. Instead, you MUST connect with our TA partner before moving forward.

Don't Terminate Colleagues Transferring within HSHS!

Is one of your colleagues transferring to another Team, Department or HSHS ministry? Don't terminate them! The Talent Acquisition or our HR Data team will handle all the necessary changes. There are no action items for you as the current Manager. The colleague will be moved off your org chart on the transfer date.

Colleague wishes to move from Full Time to Part Time (FTE decrease)

Is one of your colleagues asking to move from Full time to Part time?

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If you plan to backfill the FTE left from the change to Part Time:

1. Submit a job change to decrease the colleagues FTE for his/her chair/position from Full Time to Part time.
2. Create a requisition for a new chair/position for the FTE that will be left open from the change. This must be approved by Position Review Committee.

If you don't plan to backfill the FTE left from the change to Full Time to Part Time, you can submit a Job Change to reduce the FTE for the current chair/position your colleague occupies.

Colleague requests to move from Part Time to Full Time (FTE increase)

If increasing FTE for a colleague, must submit a change of status for review by the Position Review Committee. Once approved, you may submit the job change to increase status for your colleague.

Additional/Secondary Positions

Workday will allow colleagues to hold secondary positions within HSHS. Determining if an actual additional job is needed depends solely on the job code and rate of pay, as compared to the primary position.

Same Job Code/Rate of Pay. You do NOT need to request a chair/position for an additional position in Workday when the Primary Position is the same job code and rate of pay as the Additional Position. Colleagues in any one established Job code can float to other HSHS ministries and departments without needing an additional secondary chair/position in Workday. Please view the API My Time Colleagues Floating Time instructions. However, you may need to submit a ServiceNow ticket to the HRIS team for staff scheduling purposes only, if applicable.

Different Job Code/Rate of Pay. In this circumstance the colleague *does* need to have an additional job established in order to pay them correctly. For any leader who wishes to establish an additional job for a colleague within HSHS, you must first create a new position for them to sit in.

The new additional position can be initiated by searching "Create a Job Requisition" in Workday. The requisition will default under your own Supervisory Organization (your own team), but you can select subordinate Supervisory Orgs if you have them. Then select the "Create New Position" option. On the next "Recruiting Information" screen select **Create Additional Job for HSHS Colleague - Internal Fill Only** from the "Reason" dropdown menu. In this case, because this is a new position, there is no "Replacement For" to be selected. The "Recruiting Start Date" and the "Target Hire Date" should always be today's date (the date you are completing the Req). Continue through the remaining steps to create the requisition.

After all required workflow approvals have occurred in Workday, the requisition will flow over to iCIMS and will be presented to the Position Review Committee for approval. Your HR Partner will notify you of the status and next steps.

Requesting/Changing a Colleagues Base Pay

Before requesting a change to a colleague's base pay in Workday, approval must be given at Position Review Committee. Please contact your local HR Partner to discuss your request. If approved, your HR Partner will give the approval to enter in the compensation change request. Please note Workday approvals will also be initiated before the transaction is complete/accepted.

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Workday Approvals - Send Back vs. Deny

When you receive a business process for approval, you have several options: Approve, Send Back and Deny. It is important to understand the difference between Send Back and Deny.

- **Send Back** means you are returning the process to its initiator with comments about corrections that need to be made before you can approve it.
- **Deny** immediately cancels the entire process. The initiator cannot make corrections after a denial and must start over from the beginning.

What Happens When a Manager Leaves?

If an existing manager leaves the organization, any pending business processes will be assigned to that manager's manager. The colleagues and tasks inherit "Up". The manager's manager should then reassign the pending items.

Saving and Printing Org Charts

Did you know you can download a copy of your HSHS organizational chart, complete with photos? Just type my org chart into the search bar. Once the chart loads, click the printer icon on the right side. You can download the chart in Excel, PowerPoint or PDF format. You can also specify the number of levels to include

Colleague Photos

Did you know all colleagues can update their own photos in Workday? From the Personal Profile page press the Actions button, then navigate to "Personal Data" then "Change My Photo". When changing the photo, the following photo guidelines are presented:

- All photos should be professional
- Any photo uploaded to Workday should be appropriate for a security badge

A Reminder about Halogen

With the introduction of Workday as the new performance management system, Halogen is no longer being updated to reflect new hires, transfers, or manager assignment changes as of Dec 2021. Halogen remains online and is available to colleagues for reference and data retrieval purposes only. Halogen will be taken offline permanently in June 2022.

Where to go with Questions

If you have Workday related questions, please navigate to the Workday Resources area within the MyHR portal. You will have access to key quick reference guides and instructional videos. If you need further assistance with navigating through Workday or entering any transaction such as a job change or termination, please submit the "Workday Assistance Request" form in the MyHR portal so that a team member can assist you https://hshs.employee.us.people-doc.com/request-forms/workday-assistance-request

If you encounter a browser issue or a login error or a Workday error message, please submit a ServiceNow ticket.