



STATEWIDE PERSONNEL
— S Y S T E M —

Contractual Renewals

January 2015



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Contractual Renewal Process

Business Process Overview

To complete a contract renewal you must perform the following tasks in Workday:

1. **Maintain the Employee Contract(s).** Close any open contract(s) for the employee. Then, add a new contract with the appropriate review code. Attach the new contract. Contract renewals with a Contract Review Code of 99 will be routed to DBM Classification and Salary Division for approval.
2. **Request Compensation Change.** Perform a “miscellaneous adjustment” to update the Hourly Rate (if applicable) and update the Contract “Not to Exceed” amount to reflect the new contract and the new contract end date. The compensation change requires approval.

NOTE: You do not have to wait for the approval of the tasks listed above before starting the other.

Before you begin...

You will need the following information to complete the contract renewal process:

1. Employee ID and/or name of the employee for which you are renewing a contract
2. Scanned copy of the contract to attach
3. New contract details, including:
 - Start and end dates
 - Contract review code
 - Contract Not-to-Exceed (NTE\$) amount
 - Employee hourly rate compensation

Maintain Employee Contract(s)

Use the procedure below to close any existing employee contracts for contractual employees and to add the new contract.

Procedure:

1. Search for the employee.



Tip: Use the search field to type the employee's name or employee ID or type the employee's supervisory organization and search on the **Members** tab. You may have to click the **All of Workday** link to view search results.

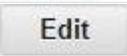
2. Click the Related Actions and Preview  icon next to the employee's name.
3. Hover over Job Change and click Employee Contract. The Employee Contracts page displays.

Employee Contracts

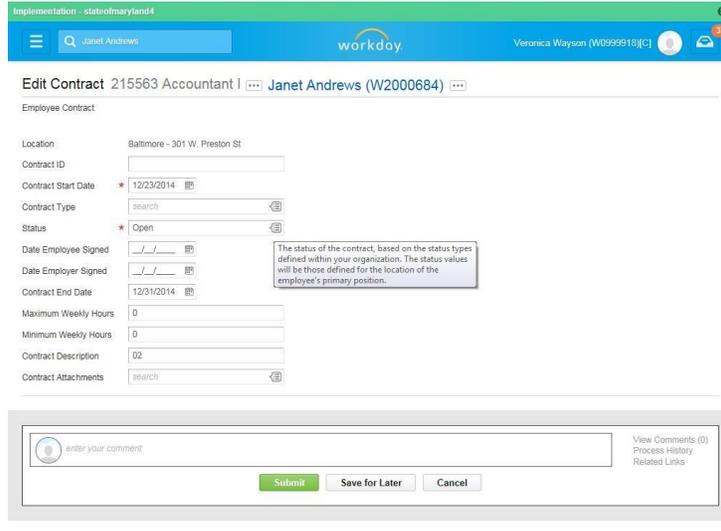


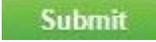
Employee Contract	Contract Start Date	Contract Status	Position at Contract Start	Current or Last Position	Current Position is Active	Contract Description	
Q	12/23/2014	Open	215563 Accountant I	215563 Accountant I	Yes	02	Edit

System Status: The next Weekly Service Update will be on Friday, December 26, 2014 from 6:00 p.m. PST (GMT -8) to Sa... © 2014 Workday, Inc. All rights reserved.

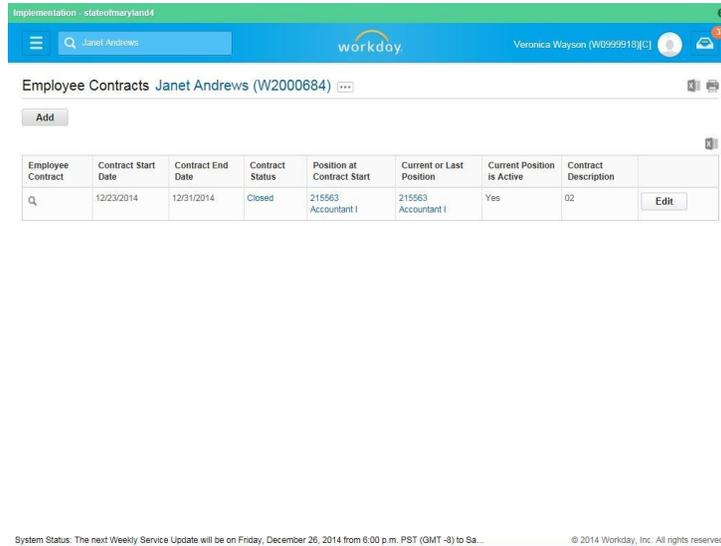
4. Identify the old contract, and then click the **Edit**  button.

Edit Contract

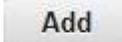


5. Click on the prompt in **Status** field and then click the **Closed** hyperlink.
6. Click the **Submit**  button.
7. Click the **Done**  button.
8. Repeat if there are multiple contracts to be closed.

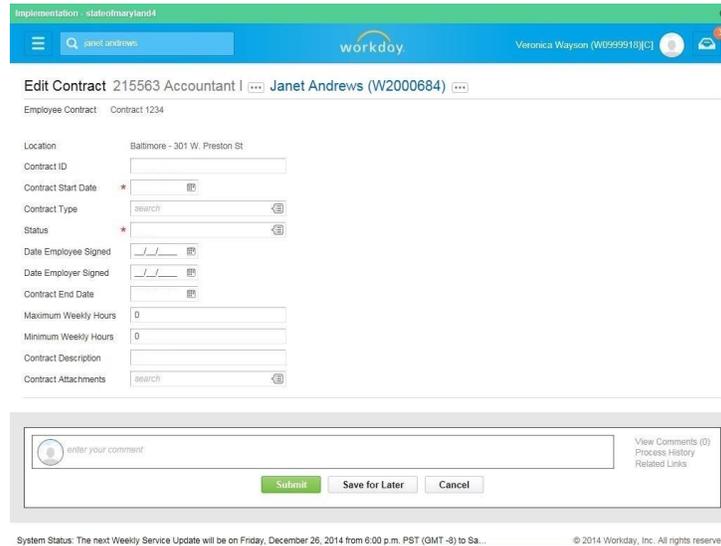
Employee Contracts



Employee Contract	Contract Start Date	Contract End Date	Contract Status	Position at Contract Start	Current or Last Position	Current Position is Active	Contract Description	
Q	12/23/2014	12/31/2014	Closed	215563 Accountant I	215563 Accountant I	Yes	02	

9. Add the new contract. On the **Employee Contracts** page, click the **Add**  button.

Edit Contract



10. Enter/update values in the following fields on the **Maintain Employee Contract** page:
 - a. Contract ID (If you have one)
 - b. Contract Start Date (e.g., first day of contract)
 - c. Contract Type (e.g., "Contractual – Contract")
 - d. Status (e.g., "Open")
 - e. Contract End Date (e.g., last day of the contract)
 - f. Contract Description (Review Code – e.g., 99)
11. Click the prompt in the **Contract Attachments** field.
12. Click the Create hyperlink, and then click Create Worker Document.
13. On the **Create Worker Document** page, click the **Attach**  button.
14. Browse for and select the contract. Then upload it.
15. Click the **Submit**  button.



Tip: If you do not want to submit the request at this point, you can also click one of the following buttons:

- Click **Cancel** to cancel the process and start at another time.

16. Click the **Done**  button. Contracts with a Contract Review Code of 07 or 99 will be routed to DBM Classification and Salary Division for approval.

- 1.
17. The System Task is complete.

Request Compensation Change for Contract Renewal

The compensation for the employee must be adjusted. Update the following compensation information:

- Hourly rate (if it is changing)
- Contract "Not to Exceed" amount (if it is changing) and corresponding end date

Use the procedure below to complete a compensation change for a contractual renewal.

Procedure:

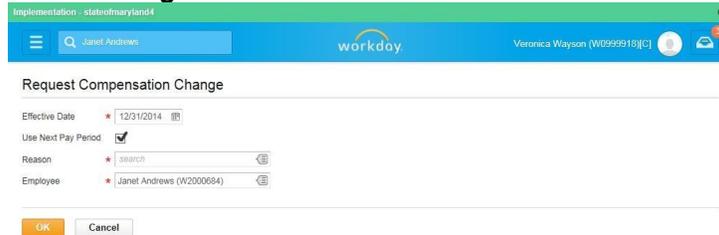
1. Search for the employee.



Tip: Use the search field to type the employee's name or employee ID or type the employee's supervisory organization and search on the **Member's** tab. You may have to click the All of Workday link to view search results.

2. Click the Related Actions and Preview  icon next to the employee's name.
3. Hover over Compensation and then click Request Compensation Change.

Request Compensation Change

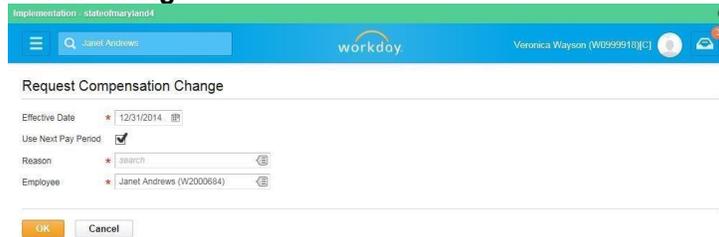


The screenshot shows the 'Request Compensation Change' form in the Workday system. The form is titled 'Request Compensation Change' and is displayed in a blue header bar with the Workday logo and user information (Veronica Wayson). The form fields include: 'Effective Date' set to 12/31/2014, 'Use Next Pay Period' checked, 'Reason' set to 'search', and 'Employee' set to 'Janet Andrews (W2000684)'. There are 'OK' and 'Cancel' buttons at the bottom of the form.

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4. Change the effective date, if needed.

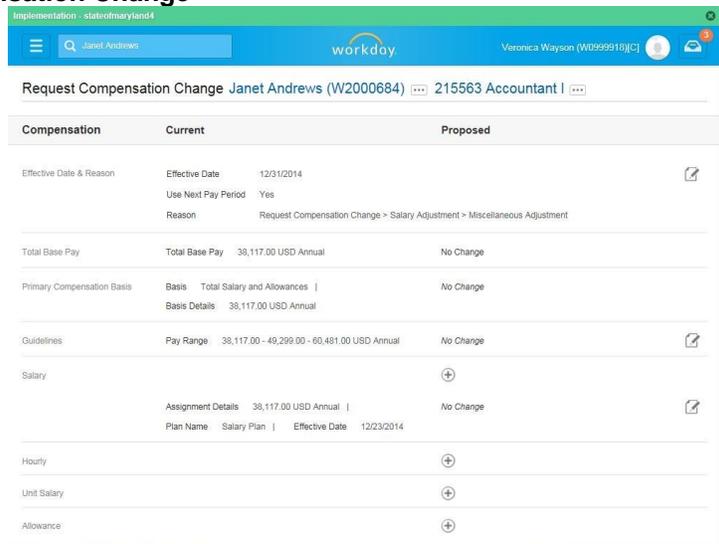
Request Compensation Change



System Status: The next Weekly Service Update will be on Friday, December 26, 2014 from 6:00 p.m. PST (GMT -8) to Sa... © 2014 Workday, Inc. All rights reserved.

5. Click the prompt in the Reason field.
6. Click “Request Compensation Change > Salary Adjustment” and then click “Salary Adjustment > Miscellaneous Adjustment”.
7. Click the **OK**  button.

Request Compensation Change



Compensation	Current	Proposed
Effective Date & Reason	Effective Date 12/31/2014 Use Next Pay Period Yes Reason Request Compensation Change > Salary Adjustment > Miscellaneous Adjustment	
Total Base Pay	Total Base Pay 38,117.00 USD Annual	No Change
Primary Compensation Basis	Basis Total Salary and Allowances Basis Details 38,117.00 USD Annual	No Change
Guidelines	Pay Range 38,117.00 - 60,481.00 USD Annual	No Change
Salary	Assignment Details 38,117.00 USD Annual Plan Name Salary Plan Effective Date 12/23/2014	No Change
Hourly		
Unit Salary		
Allowance		

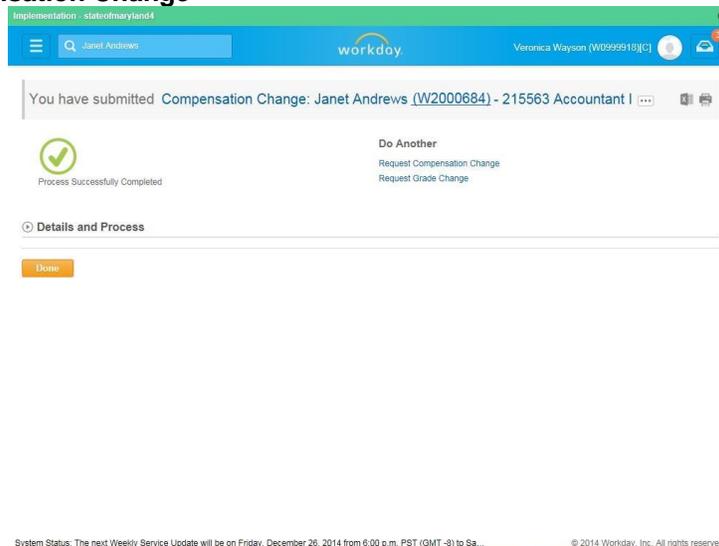
8. Perform one or more of the following actions:

If	Then
You want to update the Hourly Rate for the employee...	Update the following in the Proposed column... <ul style="list-style-type: none"> - Click the Edit  icon in the Hourly row. - Type or use the prompt to enter the Amount. - Click Done. - Click any where on the screen to refresh the page.

If	Then
	<ul style="list-style-type: none"> - Verify the Total Base Pay in the Proposed column at the top of the page.
<p>You want to update the Contract Not to Exceed amount (found on the employee's contract) and corresponding end date...</p>	<p>Update the following in the Proposed column...</p> <ul style="list-style-type: none"> - Click the Edit  icon to in the Allowance row. - Enter the contract not to exceed amount (Contract NTE\$) in the Amount field. - Click the arrow next Additional Details to expand the section. - Enter the contract end date in the Expected End Date field. - Click Done.

9. Click the **Submit**  button.

Request Compensation Change



10. You have submitted the compensation change. Click the **Done**  button.

11. The System Task is complete.