Hires, Reinstatements, Transfers in Workday

Covered Topics:

- Information Flow: JobAps to Workday

- Reviewing JobAps Information:
  - Editing
  - Adding (Required Data)

- Service dates

  - Re-instatements

- Transfers:
  - Shell Records
  - JobAps Reasons / Workday Reasons
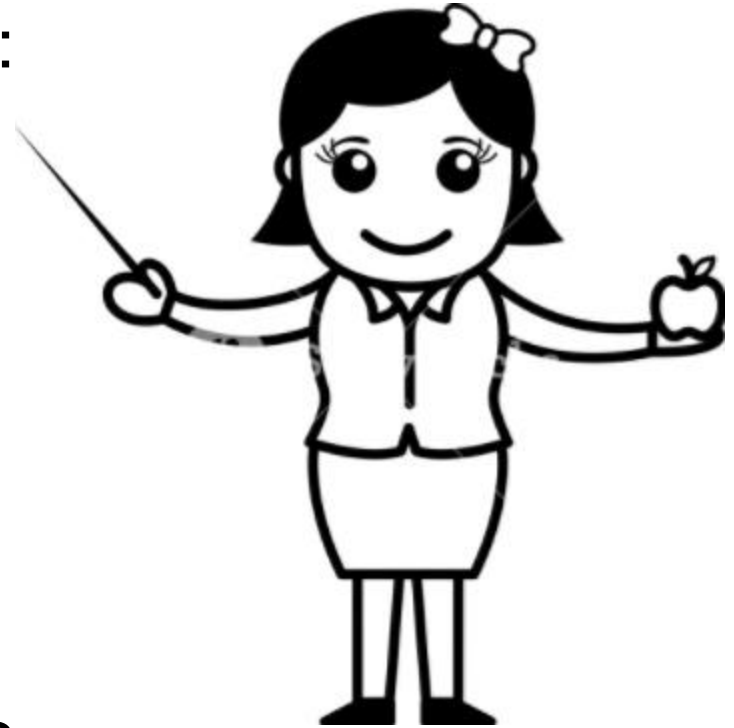
# Information Flow JobAps → Workday

The Hire Business Process

- Used to hire employees (paid through CPB); not contingent workers
  - i.e., State/Regular, Contractuals (Seasonal and Fixed Term), Temporary Employees, Interns, SPMS and University Faculty

- Initiated in one of two ways:
  - Job Aps:
    - For competitive recruitments, including special appointments
    - Most hires are done this way
    - Includes hires, rehires, and transfers
    - Information from the Hire Details page, including name, PIN, and salary will integrate into Workday

  - In Workday:
    - For hires that are not paid through CPB (Contingent workers and Temporary Workers only)

Hire: Integration with JobAps
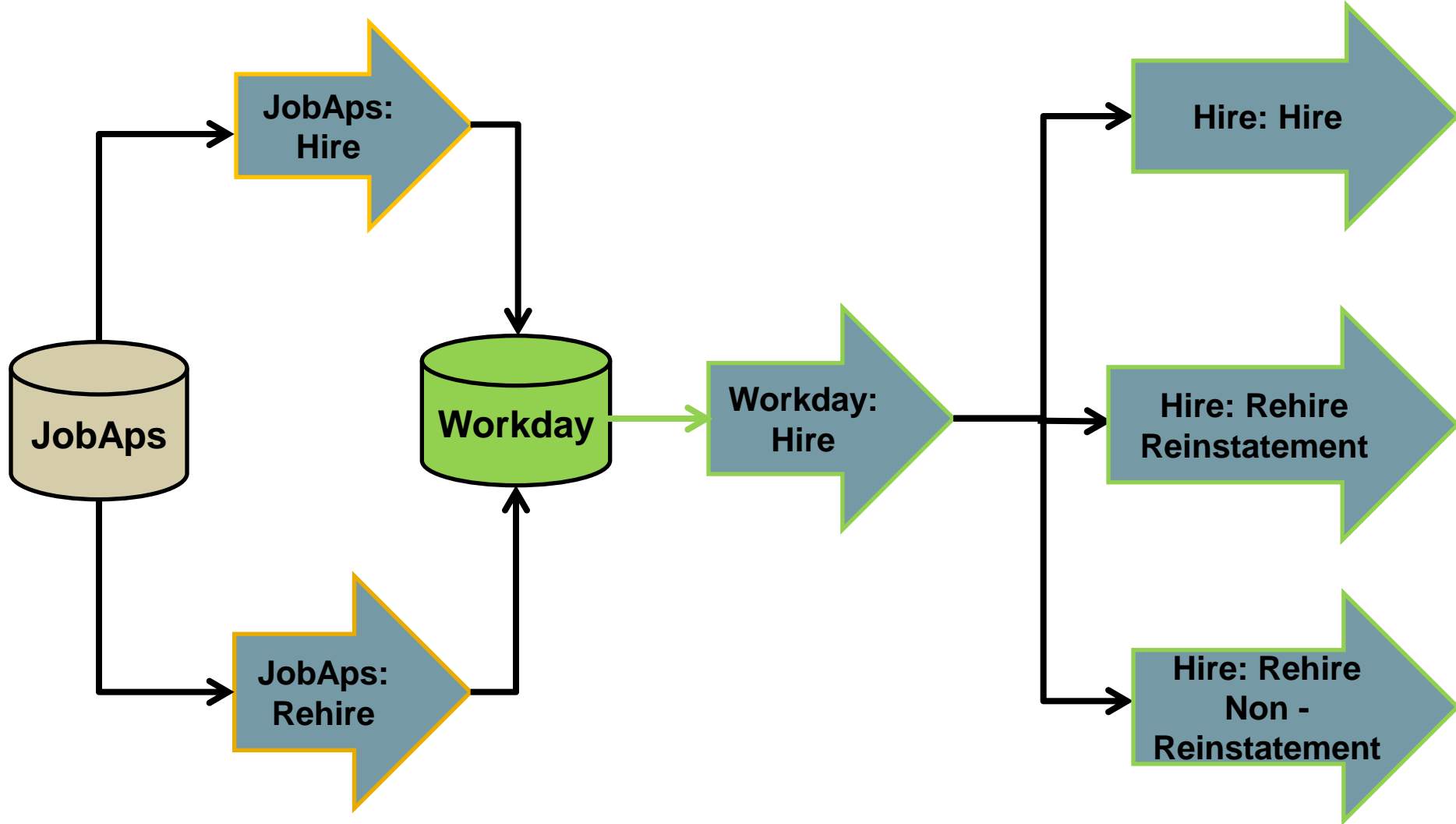
What **DOES** come over from JobAps:

- **Hire Reasons** – All hires/rehires come into Workday as a "Hire"

- **Hire Dates** – Can be changed through inbox item

- **Job profile** – Cannot be changed through hire process; need to complete ***Edit Position Restriction*** business process

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Hire: Integration with JobAps

- When a hire/rehire integrates from JobAps into Workday, it appears as a new inbox item in the HRC inbox entitled **Review Employee Hire.**
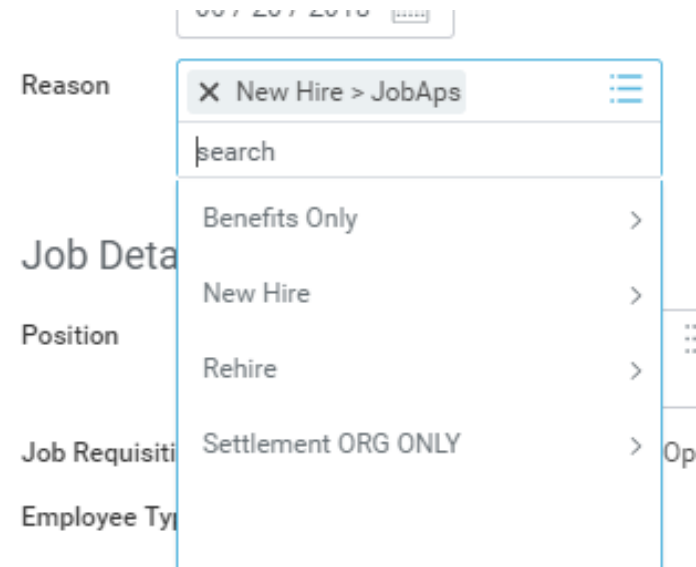

These fields can be edited upon completing this inbox item.

Hire: Integration with JobAps

Hire reasons should be changed through inbox item in Workday based on the documentation on the hire.
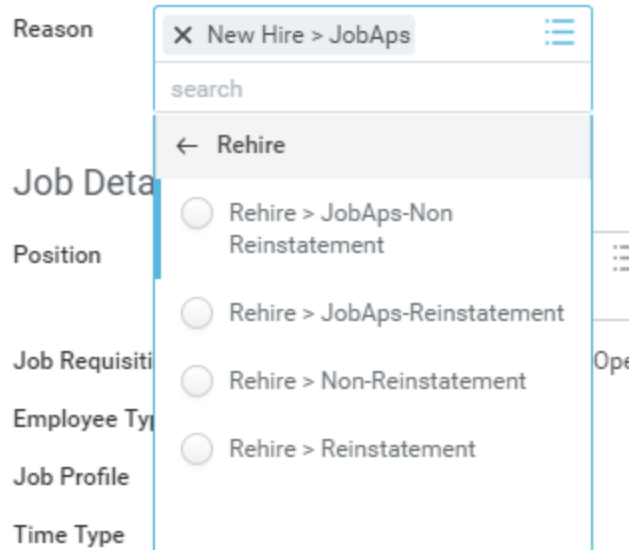
Should distinguish between rehire reinstatement and <u>non</u>-reinstatement.

What <u>Does NOT</u> come over from JobAps:

Key information is <u>necessary</u> with Benefits implemented into the system that is **NOT** integrated from JobAps:

❖ Home address

   Including county

❖ Personal Email

Service Dates

Service Dates

- <u>Company Service Date</u>
    Increment Date (1/1/Year or 7/1/Year)
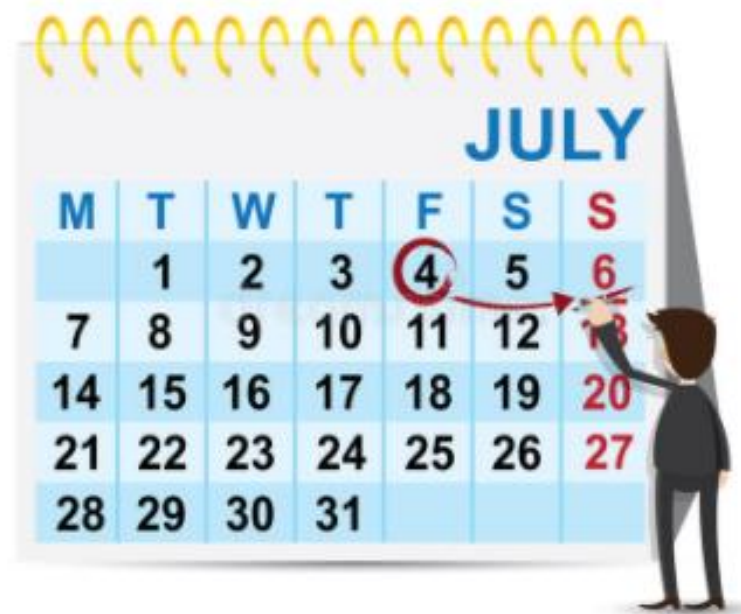
- <u>Time Off Service Date</u>
    Used for calculating Accruals

- End of Employment Date
    Must be entered for *Contractuals*

Date Fields By Process: Hires

- **Hire Date**: populates; cannot change
- **Original Hire Date**: populates with Hire Date; can be changed
- **Continuous Service Date**: populates with Hire Date; can be changed
- **Company Service Date**: Increment Date; needs to be changed
- **Time Off Service Date**: Does not populate; needs to be entered

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Date Fields By Process: Rehires

- **Hire Date**: populates with the *new* hire event date; can not change
- **Original Hire Date**: stays with the last entered date ; can be changed
- **Continuous Service Date**: populates with the *new* hire event date ; can be changed
- **Company Service Date**: Increment Date; review for any needed changes
- **Time Off Service Date**: Does not populate; review for any needed changes

Date Fields By Process: Transfers

- **Transfers**
  - No automated changes; review all fields for any needed changes
  - Contractual Transfer (SB172):
    - Appointment date – date placed in regular position.

Hire Date

Hire Date   09/30/2015

Termination Date   02/04/2015

Original Hire Date   10 / 31 / 2001

Continuous Service Date   01 / 22 / 2004

Length of Service   13 year(s), 9 month(s), 16 day(s)

Date Entered Workforce   MM / DD / YYYY

Benefits Service Date   MM / DD / YYYY

Company Service Date   07 / 01 / 2016

Time Off Service Date   12 / 19 / 2002

Retirement Eligibility Date   MM / DD / YYYY

Expected Retirement Date

- *Hire Event* - Populates with the new "Hire" event date, overwrites the previous hire event date.
- *Rehire Event* - this will populate with the *new* hire event date – overwriting the previous hire event.
- *Change?* - **Cannot** be changed
- *Used for* – records latest hire event

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Original Hire Date

Hire Date	09/30/2015
Termination Date	02/04/2015
Original Hire Date	10 / 31 / 2001
Continuous Service Date	01 / 22 / 2004
Length of Service	13 year(s), 9 month(s), 16 day(s)
Date Entered Workforce	MM / DD / YYYY
Benefits Service Date	MM / DD / YYYY
Company Service Date	07 / 01 / 2016
Time Off Service Date	12 / 19 / 2002
Retirement Eligibility Date	MM / DD / YYYY

- *Hire Event -* Populates with the new "Hire" event date
- *Rehire Event* - it will stay with the last entered date and it should not be changed unless an *earlier* hire event was not captured. For example, if an employee has a non-SPMS agency hire date in 2001 that is earlier than the Workday Hire Date in 2010, then you can change this field to reflect that date.
- *Change?* – Can be changed; auto-populated from hire date
- *Used for* - records previous state service that may not be captured in Workday

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Continuous Service Date

Hire Date	09/30/2015
Termination Date	02/04/2015
Original Hire Date	10 / 31 / 2001
Continuous Service Date	01 / 22 / 2004
Length of Service	13 year(s), 9 month(s), 16 day(s)
Date Entered Workforce	MM / DD / YYYY
Benefits Service Date	MM / DD / YYYY
Company Service Date	07 / 01 / 2016
Time Off Service Date	12 / 19 / 2002
Retirement Eligibility Date	MM / DD / YYYY

- *Hire Event -* Auto-populated with effective date of Hire
- *Rehire Event -* automatically populates with the *new* hire event date whether it is designated as reinstatement or not. **THIS DATE** should be adjusted, if needed. If it is a reinstatement, then this date should be adjusted to capture the employee's previous service. The agency is responsible for maintaining it.
- *Change?* - Can be changed; auto-populated from hire date
- *Used for* - calculating "*length of service*" in Workday; represents "*Total State service*"; used to determine if PEP is Mid or Annual. Increment date. Does NOT need to match Time Off Service Date

Company Service Date

Hire Date 09/30/2015

Termination Date 02/04/2015

Original Hire Date 10 / 31 / 2001

Continuous Service Date 01 / 22 / 2004

Length of Service 13 year(s), 9 month(s), 16 day(s)

Date Entered Workforce MM / DD / YYYY

Benefits Service Date MM / DD / YYYY

Company Service Date 07 / 01 / 2016

Time Off Service Date 12 / 19 / 2002

Retirement Eligibility Date MM / DD / YYYY

Expected Retirement Date

- **Increment Date** (1/1/Year or 7/1/Year) Contractuals: Date of 1st continuous contract in same principal department
  - *Hire Event -* Goes by hire date
  - *Rehire Event -* Goes by Continuous Service date
  - *Change?* – Needs to be manually entered
  - *Used for – Increments:* *it could change*

Time Off Service Date

Hire Date	09/30/2015
Termination Date	02/04/2015
Original Hire Date	10 / 31 / 2001
Continuous Service Date	01 / 22 / 2004
Length of Service	13 year(s), 9 month(s), 16 day(s)
Date Entered Workforce	MM / DD / YYYY
Benefits Service Date	MM / DD / YYYY
Company Service Date	07 / 01 / 2016
Time Off Service Date	12 / 19 / 2002
Retirement Eligibility Date	MM / DD / YYYY

- *Hire Event –* Does not automatically populate. Usually, the same as Continuous Service Date. Represents "Total State Service" if that is what needs to be used to calculate Leave Accrual rates.
- *Rehire Event* - the date stays with the last entered date. It can be adjusted if needed. Rehires do not have to be reinstatements to get service credit for the leave accrual rate. All previous State service counts towards leave accrual service credit.
- *Change?* – Needs to be manually entered
- *Used for -* used to calculate **Leave Accrual**

Time Off Service Dates

HR Personnel maintains employee service dates including the **Time Off Service Date.**

Hire Date

Adjustments for Breaks in Service

Time Off Service Date

- Determines the leave that is accrued per pay period.

- Indicates "years of service" for leave accrual purposes in Workday; represents "Total State Service".

- Adjusted by HR for breaks in service when an employee leaves and returns

- **Contractuals cannot accrue _Annual_ leave even when the Time Off Service Date is populated on their worker profile.**

Editing Employee Service Dates

Go to *Worker History > Edit Service Dates*

- The **Time Off Service Date** determines when leave accruals start; how much leave an employee is entitled. It must be entered to accrue!!! (*NOT AUTOMATIC*)

- The Hire Date and Continuous Service Date help determine the Time Off Service Date.

View Service Dates Jennifer Lawrence (W4681012)

Hire Date	12/18/1985
Original Hire Date	12/18/1985
Continuous Service Date	12/18/1985
Length of Service	30 year(s), 1 month(s), 0 day(s)
Date Entered Workforce	(empty)
Benefits Service Date	(empty)
Company Service Date	07/01/2015
Time Off Service Date	12/18/1985
Retirement Eligibility Date	(empty)
Expected Retirement Date	(empty)
Retirement Date	(empty)
Seniority Date	12/18/1985
Severance Date	(empty)
Vesting Date	(empty)

Transfers

Change Job: JobAps to Workday Workflow
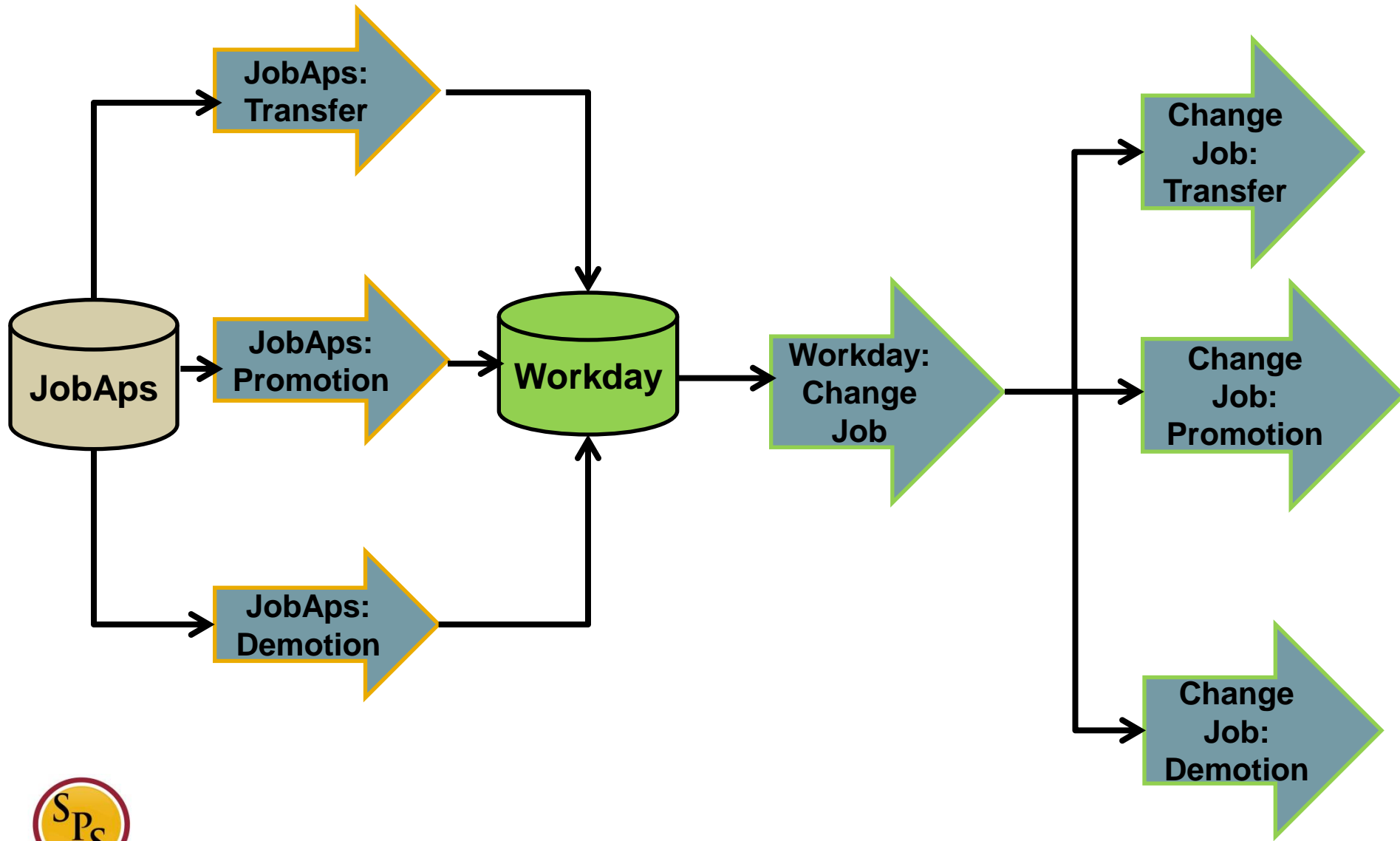
Transfers: JobAps

- **Transfer** is used for current employees who are moving from their PIN to another position; contractual or a State/Regular.

- In JobAps, *there is no field to narrow down transfer reasons; this is done in* ***Workday***

Important!

Name: ADLER, GRACE
EasyID: Adl-11-1212
Hire Department: State of Maryland

Please update the following Hire Information:

Hired: ○ Yes ● No

Process Date: [   ]

Disposition: [ER]

Status: [AC] Note: If you change the Status, it may be overridden by the Inactive Status Indicator of the Disposition.

Final Approved Salary: [   ]

Salary Frequency: [Select Salary Frequency ▼]

Action:
| Select Appointment Type |
| Hire |
| Rehire |
| Promotion |
| Demotion |
| Transfer |
| Secondary State Emp |
| Mass Hiring (DBM ONLY) |

Work Start Date:

Current or Former Employee:

Current/Former Employee Match Discrepancy: ○ Yes ● No

Employee ID: [W1111113]   W number will populate in the Employee ID field.

Number of Times Waived: 0

Please select the Position Control Number being hired into.

Position	Job Title
○ 222333	Interior Designer

Update   Clear

Transfer – Reasons to Use in Workday

- Contractual Conversion

- Contractual Transfer (non-conversion)

- End of Temporary Duty

- Indep Agency (*JobAps*)

- Intra Agency (*JobAps*)

- Other Agency (*JobAps*)

- Reassignment in Same Agency

- Temporary Duty

Things to Remember…

- The <u>Propose Compensation step does not automatically occur for transfers</u> (second step in Workday if comp change is required) or data changes.

- Do not….
  - Create a position through this process
  - Close position through this process

Special Transfer Processes

Transfer – Contractuals Requiring Compensation

If you need to complete a compensation change on a transfer processed in JobAps, once the hire is integrated to Workday:

1) In Workday, remove the "Transfer – JobAps Intra Agency" reason for the transfer.

2) Select the **Transfer – Contractual Conversion (non-conversion)**

Transfers – Shell Record/Benefits Only

Scenario I: If the employee is still employed at the Non-SPMS Benefits Only Agency

Step 1: Use the Employee Validation report to determine if the person is in Workday as a current or former employee.

Step 2: If the person is a **current employee** with a W number AND is still employed at one of the Non-SPMS agencies listed above, the select Secondary State Emp as the Action code on the Hire Details.

Hire Department: MDH Thomas B. Finan Hospital Center
Please update the following Hire Information:
Hired: ⦿ Yes ○ No
Process Date: 1/18/2018
Disposition: B
Status: AC   Note: If you change the Status, overridden by the Inactive Status Indicato Disposition.
Final Approved Salary: 35950
Salary Frequency: Annual
Action: Secondary State Emp
Work Start Date: 1/31/2018
Current or Former Employee: C ✓
Current/Former Employee Match Discrepancy: ○ Yes ⦿ No ✓
Employee ID: W1111111 ✓

Step 3: Review the Hire/Secondary State Emp from your Workday inbox after the nightly integration has occurred and confirm that Add Additional Employee Job > Secondary State Employment > JobAps is the Reason.

Supervisory Organization   MDH - Thomas B. Finan Center - Cottage 1
Effective Date   01/31/2018
Reason   Add Additional Employee Job > Secondary State Employment > JobAps

Step 4: Complete the Primary Job Switch task to make the new position the primary job. Once this has been completed, the process is complete for the receiving agency.

NOTE: The Primary Job Switch may require a ticket to the SPS Ticketing system for SSD to assist with this.

Scenario II: If the employee has been terminated from the Non-SPMS Benefits Only Agency

Step 1: Use the Employee Validation report to determine if the person is in Workday as a current or former employee.

Step 2: If the person is a **former employee** with a W number AND has been terminated from one of the Non-SPMS agencies listed above, the select Rehire as the Action code on the Hire Details.

Hired: ⦿ Yes ○ No
Process Date: 2/9/2018
Disposition: H
Status: AC   Note: If you change the Status, it may be overridden by the Inactive Status Indicator of the Disposition.
Final Approved Salary: 32364
Salary Frequency: Annual
Action: Rehire
Work Start Date: 2/14/2018
Current or Former Employee: F ✓
Current/Former Employee Match Discrepancy: ○ Yes ⦿ No ✓
Employee ID: W2222222 ✓
Number of Times

Step 3: Review the Rehire from your Workday inbox after the nightly integration has occurred and confirm that either Rehire > JobAps Reinstatement OR Rehire > JobAps Non-Reinstatement is the Reason.

Review Employee Hire JACK JOHNSON

7 day(s) ago - Due 02/20/2018; Effective 02/21/2018

Hire Date ★   02 / 21 / 2018

Reason   ✕ Rehire > JobAps- Reinstatement

Step 4: Complete the remaining steps in the Hire/Rehire process in Workday.

SPMS/CPBI Transfers

- **Transfers Between SPMS, CPBI and Benefits Only Agencies**:
  - We use "Transfer" Workday event between SPMS and CPBI agencies.
  - Receiving agency starts the transfer transaction.

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Benefits Only Transfer Process

1. SPMS/CPBI: terminate employee with reason "Voluntary - transfer to non-SPMS agency"

2. Benefits Only: Hire employee into their HR system

SPMS/CPBI → **Benefits Only**
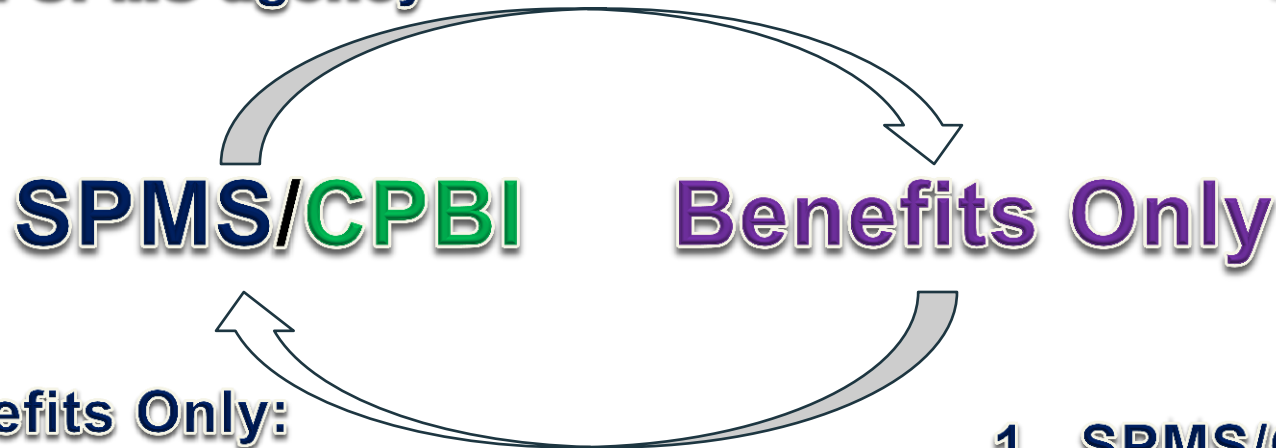
2. Benefits Only: Terminate the employee, will make SPMS position primary

1. SPMS/CPBI: Complete "Add Additional Job"

If the employee has already been terminated from the Benefits Only agency, the SPMS/CPBI agency starts the hire as a Rehire event.

Processing Hires from Non-SPMS Benefits Only Agencies to a SPMS Agency

Non-SPMS agencies use Workday for Benefits only:

- Judiciary

- MDOT

- General Assembly

- **Universities:**
  - Bowie State University
  - Coppin State University
  - Frostburg State University
  - Salisbury University
  - Towson University
  - University of Baltimore
  - University of Maryland
  - University System of Maryland Office

SPMS agencies and CPBI:

- BCCC

- Canal Place Preservation & Development Authority

- Historic St. Mary's Commission

- Maryland Food Center Authority

- Maryland Stadium Authority

- MD African American Museum Corp

- Register of Wills

- Morgan

- St. Mary's College

Additional HR Issues

End Additional Job as Terminations

- **Remind Employees:**
  - If they take a second State job in any department or university, must notify your office
  - Ask employees starting and leaving if they are going to another State job

- **Cannot Terminate an Employee in Two Jobs:**
  - Must use the End Additional Job
  - New Reasons for Voluntary and Involuntary End Additional Job

- **Retirement**
  - Must coordinate with other agency to end the secondary job.
  - Employee must be terminated to add the Retiree Status.
  - Employee has to be separated from employment for 45 days.
  - Secondary agency can rehire the employee, after 45 days.

Benefits Only: Common Hiring Mistakes

- **Not using the Employee Validation**
  - Not determining if the employee is a Benefits Only current/terminated employee before completing the Hire Details.
  - Not correcting a discrepancy on the application.

- **Selecting the incorrect Action reason on the Hire Details**
  - Hire will create a duplicate W number for the employee.
  - Transfer, promotion and demotion will not be accepted by Workday.
  - It will either be Secondary State Employment (current Benefits Only employees) or Rehire (terminated Benefits Only employees)

- **Not completing the Job Switch** task in Workday after adding the Secondary State Employment
  - The Benefits Only job will remain the primary job

- **Completing the Add Job directly in Workday** vs. JobAps when there was a recruitment

Fields That Impact Benefits

- **Leave Events (unpaid)** – Direct billing

- **Home Address (with county) and Personal Email** –
  - Access to benefit plans
  - Benefit communication

- **Service Dates** – Leave accruals

- **Employee Type** – Employee vs. Contingent; State/Regular vs. Contractual

- **FTE%**:
  - Employee Profile > Actions > Change Job >Transfer, Promote, Change Job
    - Reason: Data Changes - FTE Change
    - ONLY change "Scheduled Weekly Hours"

- **Effective Dates**:
  - **Hire Date**: Time allowed to opt into benefits (correcting the hire date does **not** change the count down – would need to be rescinded)
  - **Transactions**

Questions?