Lab: Onboarding, Employee Changes, Inbox in Workday

Covered Topics:

- Onboarding (paper vs electronic)
  - As an Employee
  - As an HRC
    - Approve
    - Cancel
- Employee Changes
  - SPMS Benefit Readiness report
  - DOB, Ethnicity, Gender, etc.
  - SSN
- Inbox Filters

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Employee Onboarding

Onboarding – Key Points

- Agencies should continue to complete onboarding tasks outside of Workday per your organization's processes.
- Onboarding items will be sent to the new hire's Workday Inbox AND to HRC inbox for completion.
- HR must ensure that the onboarding tasks are completed in a timely manner:
  - Tasks left open may prevent future changes to employee data.
  - Will cause negative feedback on agency scorecards (contact information and emergency contact information).
  - There are Due Dates for each step in the hire process, these are based on the transaction date. If the due dates are missed for completing a step, the step will have to be cancelled/deleted and reprocessed in the system.
  - All Onboarding tasks need to be completed for some onboarding tasks to move from the pending status (includes HRC approvals).

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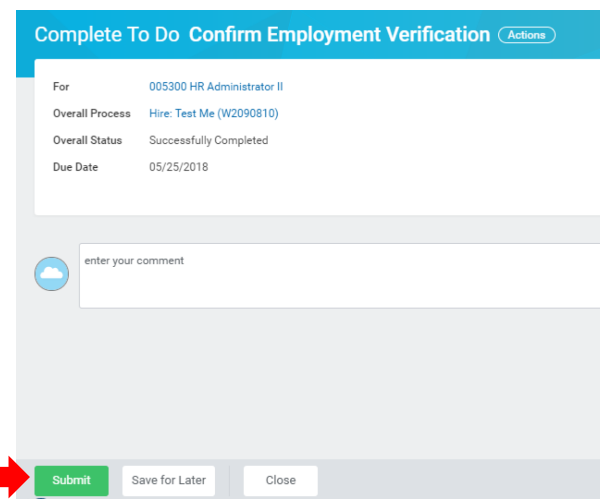
Onboarding Tasks – For HRC

After entering Personal Information for a new hire, the HRC will get these “Checklist” To Do tasks in their inbox.

For each, you should click the grey To Do button and select Submit.



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Onboarding Tasks – For Employee

Once the To Do tasks are complete by HR, the employee will need to complete ALL of their on boarding items in their inbox:

Hire	To Do: Confirm Employment Verification	Step Completed	05/11/2018 08:25:58 PM		Cheryl Murphy (W1062466) (HR Coordinator)
Hire	To Do: Setup in Time Keeping System	Step Completed	05/11/2018 08:26:02 PM	05/10/2018	Cheryl Murphy (W1062466) (HR Coordinator)
Hire	To Do: IT Setup Tasks	Step Completed	05/11/2018 08:26:08 PM		Cheryl Murphy (W1062466) (HR Coordinator)
Onboarding	Review and Acknowledge State Policy Documents	Awaiting Action		05/13/2018	Test Me (W2090810) (Employee As Self)
Onboarding	To Do: Change Benefit Elections (External of Workday Process)	Awaiting Action			Test Me (W2090810) (Employee As Self)
Onboarding	To Do: Add Payment Elections	Awaiting Action			Test Me (W2090810) (Employee As Self)
Onboarding	Review and Ackowledge the Non-Sensitive Position Policy	Awaiting Action			Test Me (W2090810) (Employee As Self)
Onboarding	To Do: Change My Photo	Awaiting Action		05/13/2018	Test Me (W2090810) (Employee As Self)
Onboarding	Update Contact Information	Awaiting Action			Test Me (W2090810) (Employee As Self)
Change Emergency Contacts	Update Emergency Contacts	Awaiting Action			Test Me (W2090810) (Employee As Self)
Complete Form I-9	Complete Form I-9	Awaiting Action			Test Me (W2090810) (Employee As Self)
Change Benefits for Life Event	Change Benefits for Life Event	Awaiting Action			Test Me (W2090810) (DBM Organizations and Employee As Self)

HR will need to review the employee's submitted I-9 and complete the documentation portion. This will complete the employee's onboarding (except benefits)

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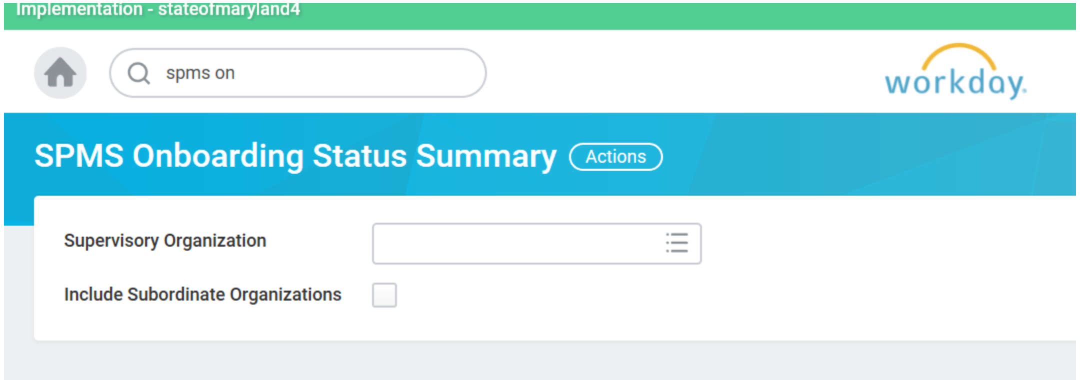
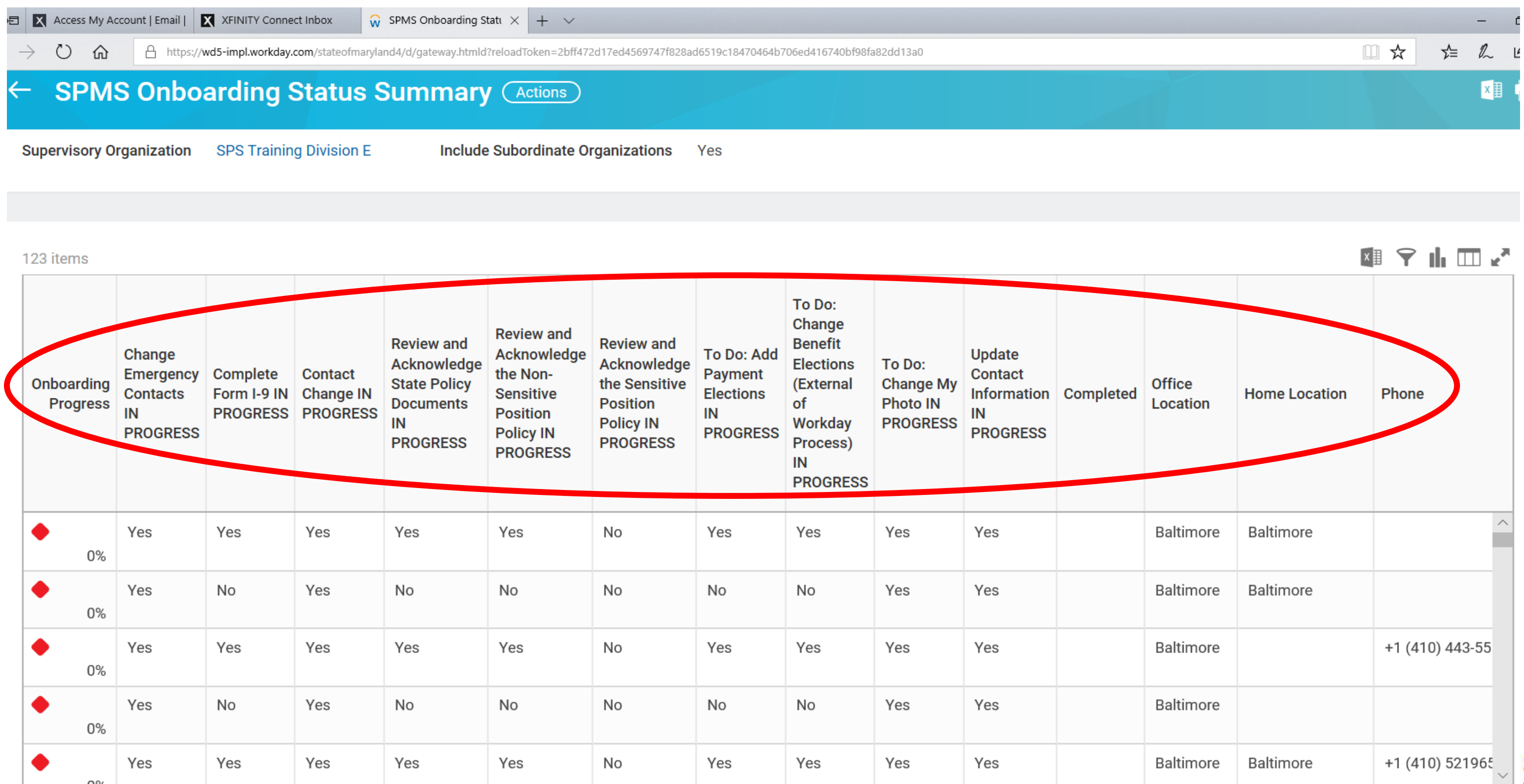
Onboarding - SPMS Onboarding Status Summary





Onboarding Progress	Change Emergency Contacts IN PROGRESS	Complete Form I-9 IN PROGRESS	Contact Change IN PROGRESS	Review and Acknowledge State Policy Documents IN PROGRESS	Review and Acknowledge the Non-Sensitive Position Policy IN PROGRESS	Review and Acknowledge the Sensitive Position Policy IN PROGRESS	To Do: Add Payment Elections IN PROGRESS	To Do: Change Benefit Elections (External of Workday Process) IN PROGRESS	To Do: Change My Photo IN PROGRESS	Update Contact Information IN PROGRESS	Completed	Office Location	Home Location	Phone
0%	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes		Baltimore	Baltimore	
0%	Yes	No	Yes	No	No	No	No	No	Yes	Yes		Baltimore	Baltimore	
0%	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes		Baltimore		+1 (410) 443-55
0%	Yes	No	Yes	No	No	No	No	No	Yes	Yes		Baltimore		
0%	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes		Baltimore	Baltimore	+1 (410) 521965

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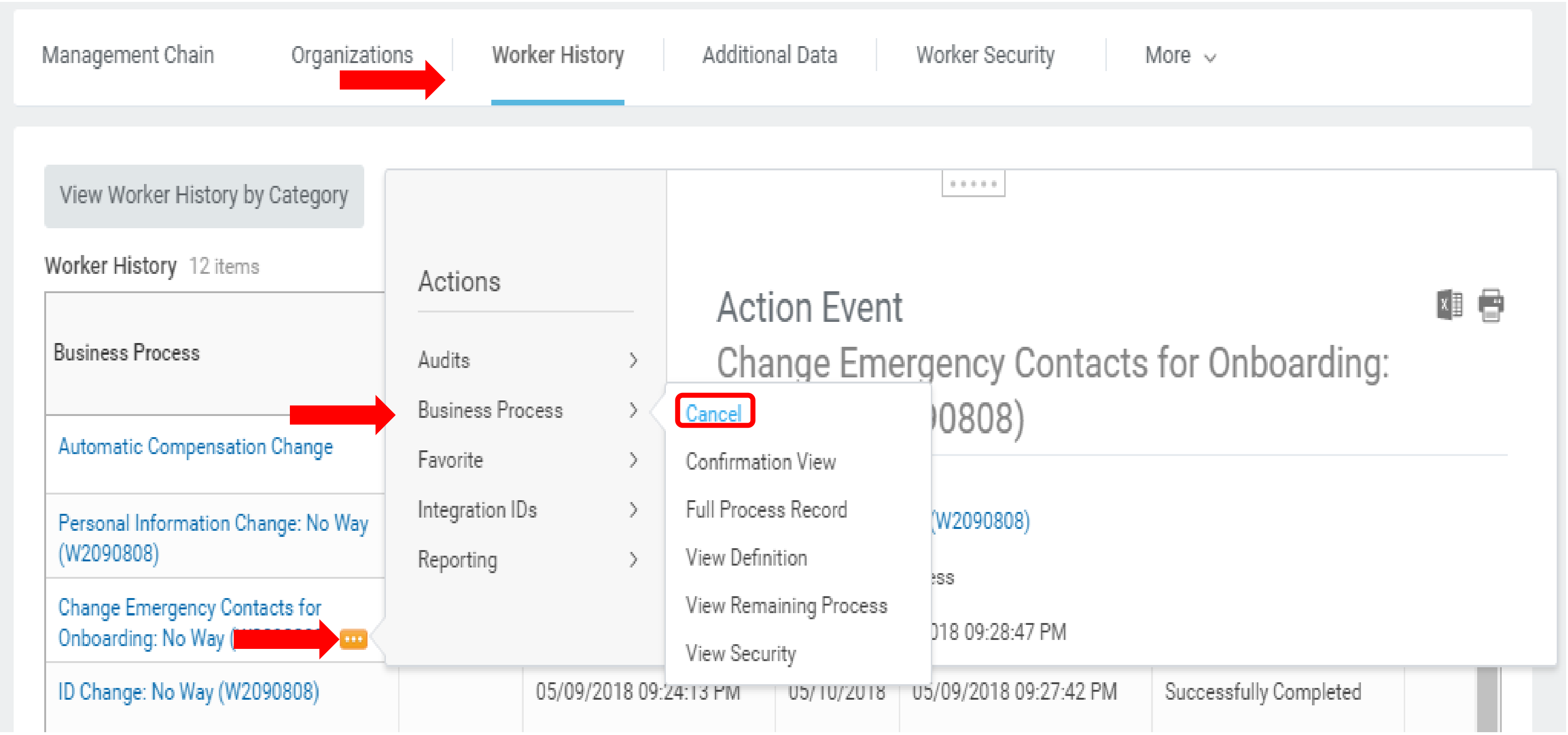
Canceling Transactions

- "In progress" business processes can be cancelled or deleted by the initiating personnel (whoever started the business process, usually HRC) or members of DBM Shared Services.
- On-boarding processes (update contact/ emergency contact information) can be cancelled by the <u>initiating personnel, Shared Services or the employee completing the onboarding</u>
- <u>Cancel *ONLY* the Onboarding step </u>(ex. Contact Information), *not* the overall Onboarding process.
- If a transaction is "Successfully Completed", it cannot be cancelled

Canceling Transactions

The process to cancel a transaction is:

Worker History>Related Actions>Business Process>Cancel/Delete



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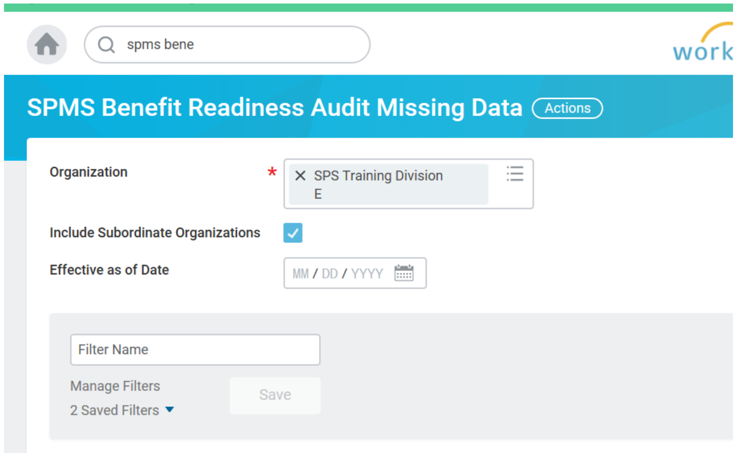
Employee Data Changes

SPMS Benefit Readiness Audit

Report gives employee information that is imperative for benefits, allows HR to find missing information and readily monitor data integrity:

- Legal Name
- DOB
- Home Address
- Personal Phone
- Personal Email
- FTE
- Retirement Information
- Fund Code



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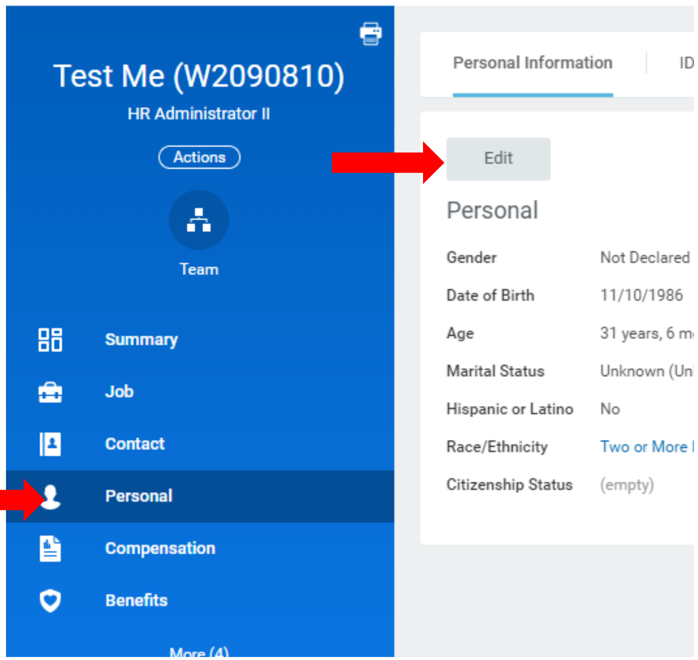
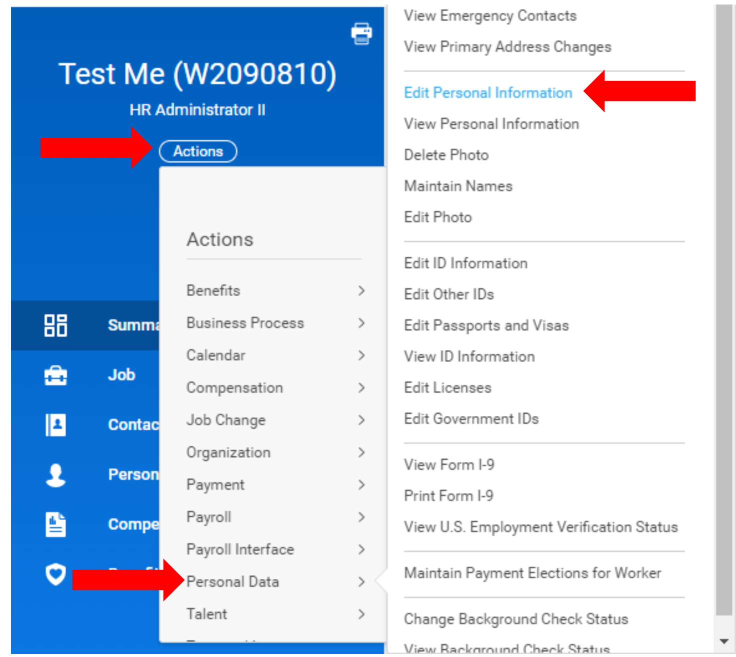
Employee Information - Editing

- Option 1:



- Option 2



HRCs can make changes to employee personal information (shown above) without any approvals however, If the employee makes a change, it must be approved.

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Social Security Number Errors

- Please ensure that you are cross checking every social security number with the name as you get the hire review. This will help prevent pay results on incorrect social security numbers.

Important Note: When rehiring, if you find that the social security number does not match the one you have selected, **DO NOT *change the social security number*** for that worker. The mismatch means the staff member you have selected to rehire is not the correct employee.

SSN correction is dependent on where you are in the hire process.

- If the hire is not yet completed and the ID change is awaiting your review to upload documentation, you can correct the social security number in this step only.
- If the hire has been completed, please prepare a help desk ticket to Shared Services to correct the social security number.
- If the hire has already gone to CPB, you will need to complete an *Edit Government IDs* transaction directly to correct it; always attach documentation

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Inbox Filters

Inbox Filters… Fun Facts

- An Inbox filter enables you to limit the action items you see in your Inbox.
- You can create a personal Inbox filter that is available only to you in your Inbox or they can be created centrally as system filters.
- You can define an Inbox filter for specific or all business processes, and then define conditions that must be met for the Inbox to display the action items.

For more sophisticated filters you can apply condition rules

- Workday retains your selections on Inbox tabs only until you navigate elsewhere.

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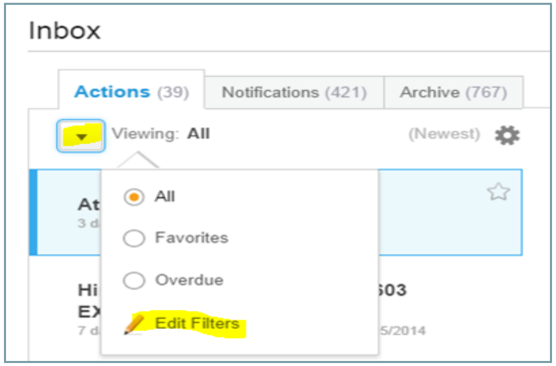
Inbox Filters… How to use them!

<u>STEP 1:</u>

From the inbox, click the Down Arrow button and click Edit Filters:



<u>STEP 2:</u>

For a new filter, click the *Create Inbox Filter* at the bottom of the page.

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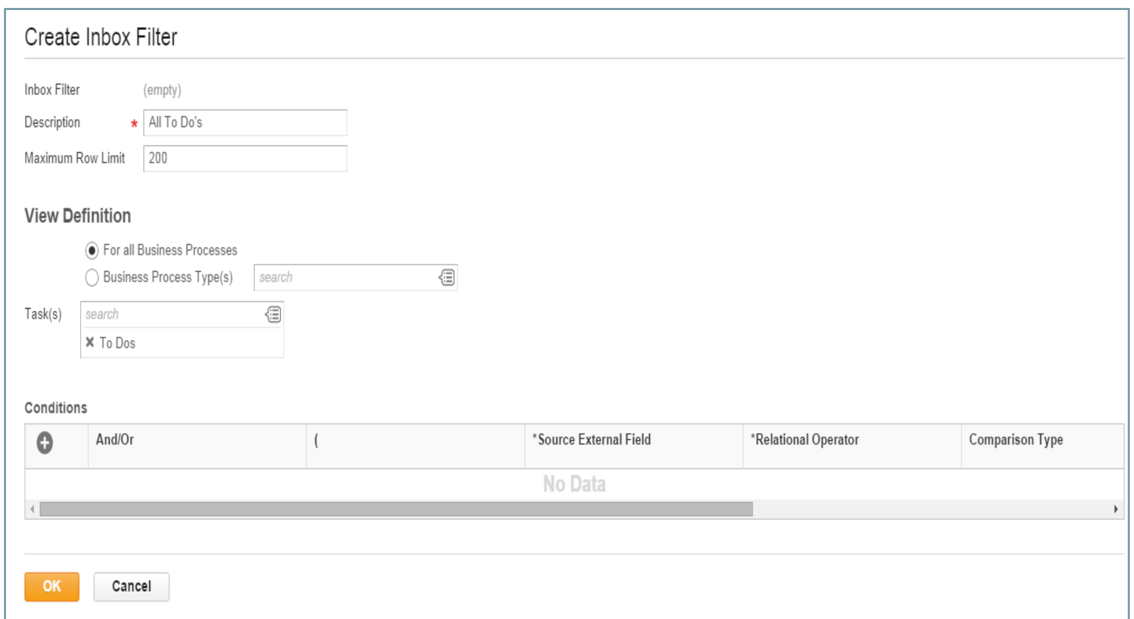
Inbox Filters… How to use them!

STEP 3:

Complete the following:

1. Type a Description
2. Check if the filter is "For All Business Process" or for a specific "Business Process".
3. Under Task(s), define what type of step in the Business Process.

For this example, a filter is created for To Do's. Another option is to filter on Approvals only as this is a task that requires a timely action.



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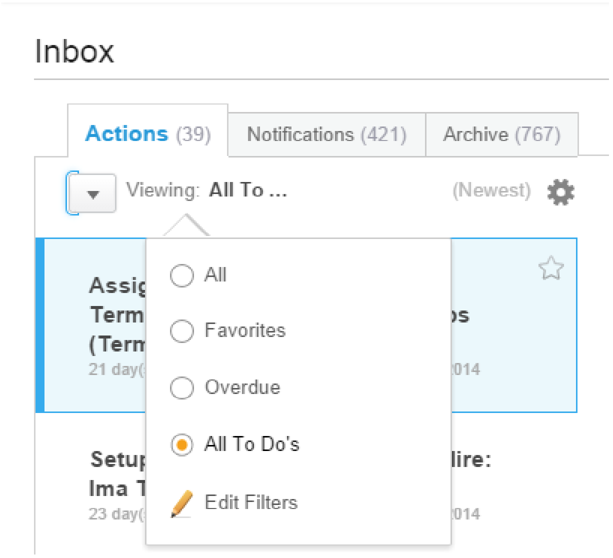
Inbox Filters… How to use them!

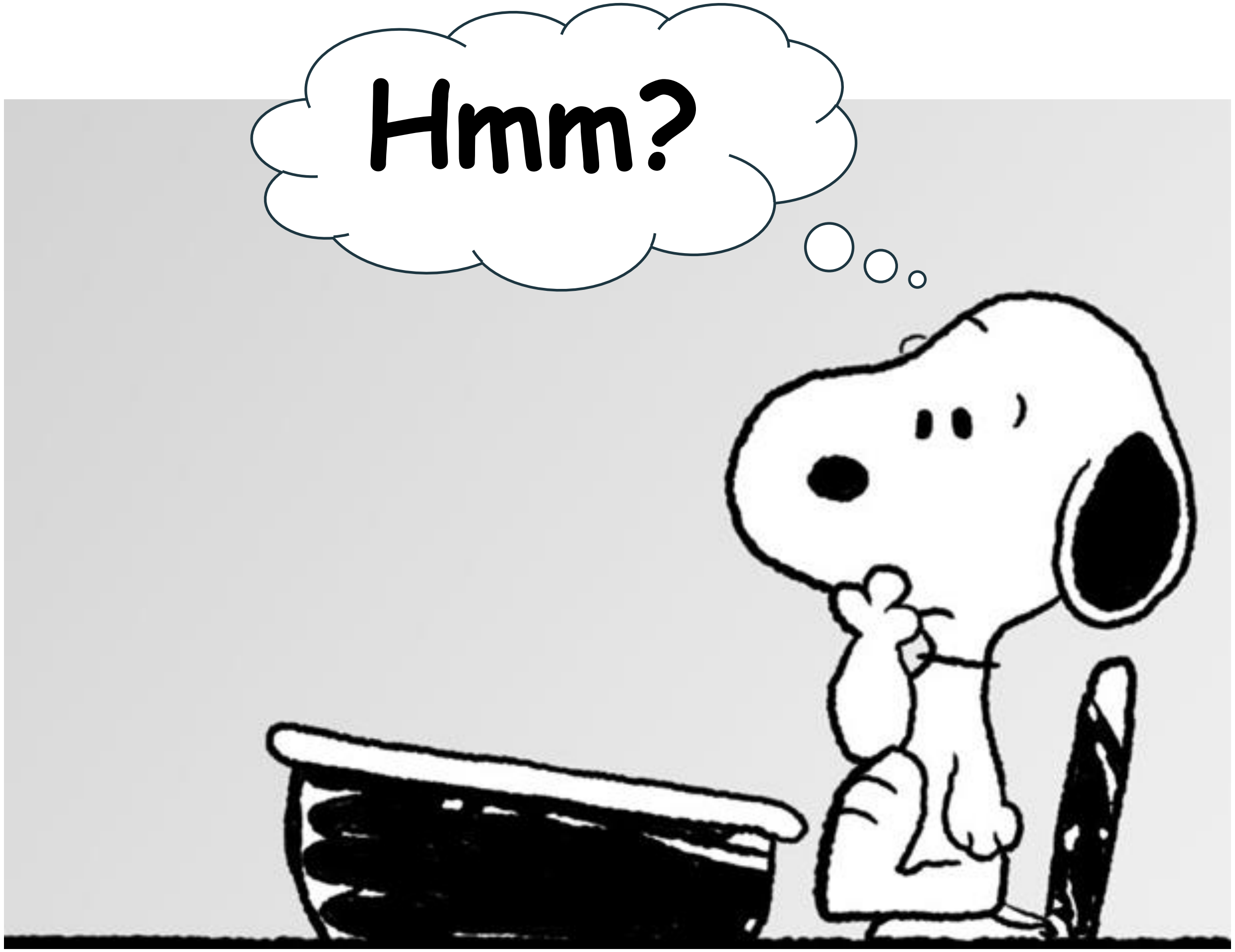
STEP 4:

Click the *OK* button and then the *Done* button.

Once complete you may navigate back to your inbox and select the filter from the drop down menu from Actions Viewing tab. Example:



Questions?



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