

# Human Resource Management System

## Workday Job Aid Staffing



This Job Aid describes the information People Managers can view about their workers in the organization.

- Employees
- People Managers
- Human Resources

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### 1. Union Membership Event

Within Workday an HR Partner can review a list of the Unions as well as update member-specific information regarding their union affiliation. An employee can be an active member of only one union at a time.

Here are the steps used to gain access to the list of Unions associated with the County:

- In the Workday Search bar enter "union".
- Click on the report **Unions** in the results returned.
- Find the union you wish to look at and click on the **magnifying glass** icon in the left-most column. This will cause the report to display.

**Note:** There are several tabs of interest. (Current Members, Terminated Members, and Previous Members.

- Clicking on any of the tabs will display the corresponding information.
- Click on the Workday icon in the upper left corner of the screen to return to the Homepage.

Here are the steps used to flag an employee as terminated in a union:

- In the Workday Search bar enter "man uni".
- Click on the task **Manage Union Membership** in the results returned.
- Select the **Worker's** name.
- Select the Union you wish to update.
- Click **OK**.
- Enter the **End Date**.

**Note:** The End Date is equivalent to the termination date. On this date, the employee's name will be removed from the Current Member tab and added to the Terminated Member tab on the Unions report.



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### 2. Title Change

The steps involved to change an employee's title are documented in the **View/Change Personal Information** job aid ([SC-CM-TRN-005 Job Aid - View-Change Personal Information](#)). Please review that document for further details.



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### 3. Service Dates Change

There are several Service related dates that are defined for each employee. Many of these are determined and assigned based on several back Workday processes. There may be conditions in which some of those dates need to be manually adjusted. In this lesson, we will explain the steps used to update an employee's service dates.

Here are the steps required to perform a service date change in Workday:

- In the Workday Search bar enter the employee's name.
- Click on the employee in the results returned.
- Click on the **Actions** button, hover over **Work History**, and then click on the **Edit Service Dates** menu item.
- Make the necessary updates to any of the **Service Dates** listed.
- Click **Submit**.
- Click **Done**.

**Note:** Original Hire Date should not be changed.



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### 4. Manage Retiree Status

The retiree status for a non-active employee can be added or removed in Workday.

Here are the steps required to **Add a Retiree Status** in Workday:

- In the Workday Search bar enter "add ret sta".
- Click on the **Add Retiree Status** task in the results returned.
- Select the employee from the list provided.
- Click **OK**.
- Fill in the appropriate fields (\* indicates a required field).
- Click **Submit**.
- Click **Done**.

Here are the steps required to **Remove a Retiree Status** in Workday:

- In the Workday Search bar enter "rem ret sta".
- Click on the **Remove Retiree Status** task in the results returned.
- Select the employee from the list provided.
- Click **OK**.
- Fill in the appropriate fields (\* indicates a required field).
- Click **Submit**.
- Click **Done**.



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### 5. Assign Pay Group

A pay group governs the who and when regarding employees getting paid via payroll. Members of the same pay group share the same period processing schedule.

Here are the steps involved in assigning a pay group to an employee:

- In the Workday Search bar enter "ass pay gro".
- Click on the **Assign Pay Group** task in the results returned.
- Enter the **Effective Date** of the assignment.
- Select the **Worker**(employee) from the list provided.
- Click **OK**.
- Select the **Proposed Pay Group** they are to be assigned.
- Click **Submit**.
- Click **Done**.

**Note:** If this task is performed by someone other than the payroll administrator it will need to be approved by the payroll administrator.

**Note:** This task is typically performed as part of the Hire Business Process and the Change Job Business Process. If it needs to be done outside of those two business processes, the steps above should be performed.



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### 6. Enter Tax Elections

An employee can manage their tax elections, at both the federal and state levels, without assistance from a payroll partner.

Here are the steps to follow for an employee to update their tax elections:

- Click on the **Pay** icon in the Applications section of your Workday Homepage.
- Under the **Actions** section of the page, click on the **Withholding Elections** task.
- Select the tab (Federal, State) of the documents you wish to update.
- Click **Update**.
- Select the form you wish to update.
- Click **OK**.
- Fill in all appropriate information (\* Indicates required field).
- Click **OK**.

**Note:** The processing of **Tax Elections** is part of the Onboarding process for new hires. The steps outlined above would be used if changes needed to be made after the Onboarding process was completed.



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### 7. Manage Position Freeze/Unfreeze

In the County, once a position is created it is never closed. Instead, if the position is not going to be available for hire it will be flagged as Frozen. This keeps all of the details about the position in place. The frozen attribute prevents a requisition from being generated for that position. In effect, it prevents anyone from being hired into the position.

For those positions that are frozen but are now approved by the Budget office to hire for, the position must first be Unfrozen so that a requisition can be generated for it. A member of the Budget Office will unfreeze any positions that are included in the approved budget.

**Note:** A position that is currently occupied cannot be flagged as frozen.

**Note:** Once a position is frozen it is removed from the **Staffing** tab within the Supervisory Org and added to the **Unavailable to Fill** tab.

Here are the steps a member of the Budget Office will perform to freeze and unfreeze a position in Workday:

- In the Workday Search bar enter "man pos fre".
- Click on the **Manage Position Freeze** task in the results returned.
- Select the position to be updated (Frozen or Unfrozen).
- Click **OK**.
- Fill in all appropriate information (\* Indicates required field).

**Note:** Check the Frozen checkbox to freeze a position. Uncheck the checkbox to remove the freeze status (Unfreeze).

- Click **Submit**.
- Click **Done**.





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### 8. Move Workers (Supervisory)

There will be times when an employee (worker) needs to be assigned to a different supervisory organization from the one they are currently tied to. Typically, this type of move occurs within the same department. The worker would be moved to a different Supervisory Org or Cost Center.

**Important:** If a proposed worker move is from one department to another department the **HR partner** must first check with the **Budget Office** before proceeding.

Here are the steps the HR Partner will perform to move a worker from one Supervisory Organization to another in Workday:

- In the Workday Search bar enter "mov wor".
- Click on the **Move Workers (Supervisory)** task in the results returned.
- Enter the **Effective Date** of the move.
- Select the **Supervisory Organization** where the worker(s) currently reside.
- Click **OK**.
- On the next page select the worker(s) that are to be moved by checking the box under the **Move Worker** column.

**Note:** If all workers listed are to be moved check the box next to the **Select All** option above the grid. This will select all workers listed in the grid.

- At this point, the **Proposed Supervisory Organization** needs to be identified.

**Note:** If all selected workers are moving to the same supervisory organization, the **Proposed Supervisory Organization** field at the top of the page should be used. This will populate the Proposed Supervisory Organization field for each worker row that is checked off.

**Note:** If the selected workers are being moved to different supervisory organizations, then the **Proposed Supervisory Organization** field located on the worker row should be used. Selecting at the row level will only populate that specific row and not affect the other row selections.

- Once all information has been entered, click **Submit**.



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<b>Change Log</b>				
<b>Revision Number</b>	<b>Date of Change</b>	<b>Affected Lesson</b>	<b>Action</b>	<b>Initials</b>
1.1.1.1	09/15/2021		Log Created	RK
1.1.1.2	10/27/2021	Move Workers (Supervisory)	Created Lesson	RK