Human Resource Management System

Workday Job Aid
Manage Hire Process

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. Overview – The Hire Process Lifecycle

For the majority of the County workforce, the **Position Management** staffing model is used. This tells us that to hire a person for a given job, a position must exist for that job in Workday.

A new position starts with a manager identifying a need for additional headcount for their area and including that need in the annual budget for their department. If that position is included in the approved budget and is not already defined in Workday, a budget office administrator will create it. If the position already exists, it will need to be unfrozen to be hired against.

The next step in the process is to ensure that the appropriate budget funding has been assigned to the position (if not already there) so that it can be approved. Once the position has been approved, a requisition is created for that position. At this point, the recruitment team works to fill the position.

The person hired for the position could eventually be promoted out of that position, leave the company, or retire. At the point the position becomes vacant it is not closed, but rather set to a frozen state in Workday. If the position is to be filled again it needs to be unfrozen. This is a County rule that requires budget approval each time someone is hired into a position, even if that position previously existed.

2. Revise Employee Hire (New Hires)

After an employee is hired, a review of their record in Workday may identify a correction that is needed. The following steps are to be performed by an HR Partner to make corrections to an Employee's hire record:

- In the Workday Search bar enter the employee's name.
- Click on the employee in the results returned.
- Click on **Job** on the left side of the screen.
- Click on the **Worker History** tab.
- Scroll down and find the **Hire** event under the **Business Process** column.
- Click on the **Hire** event link.

Note: The next page displayed will list the title: **View Event**.

- Click on the **Actions** Button, hover over **Business Processes**, and then click on the **Correct** menu item.
- Fill in the appropriate fields (* indicates a required field).

Note: You must enter a comment explaining the reason for the correction.

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

Note: Special care needs to be taken when adjusting historical records in Workday. Often it is best to make an adjusting transaction (especially with compensation), as opposed to modifying history.

3. Edit Government IDs

The Government ID page is used to rule out the possibility of duplicates in Workday. By entering the new hire's Social Security Number (SSN) we allow the system to confirm that there is no other employee listed with that SSN. The following steps are to be performed by an HR Partner to add the new hire's SSN:

- On the pop-up that displays after leaving the Revise Employee Hire screen, click the **Open** button.
- This will take you to the **Edit Government IDs** page.
- In the **Proposed IDs** grid, click the plus sign to add a new row.

  Note: On the new row we will be adding the new hire’s SSN.
- Select “United States of America” in the **Country** field.
- Select “Social Security Number (SSN)” in the **National ID Type** field.
- Now enter the new hire’s SSN in the **Add/Edit ID** field.

  Note: If you receive an error message after entering the SSN it most likely means that there is already an employee with that SSN in Workday. Speak with your HR Admin for assistance in resolving this matter.
- Click the **Approve** button.

  Note: This will take you to the **Change Organization Assignment** page.

4. Change Organization Assignment

The Change Organization Assignment business process is used when the default funding assignment for the employee's job is changing.

The following steps are to be performed by an HR Partner to process the Change Organization Assignment task:

- 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 **Organization**, and then click on the **Change Organization Assignments** menu item.
- Enter the **Effective Date** of the assignment.

  Note: If the employee has multiple jobs, select the job to which the change applies.
- Click **OK**.
- Fill in the appropriate fields (* indicates a required field).
- Click **Submit**.
- Click **Done**.

  Note: This will take you to the **Assign CBA** page.

5. Assign CBA (Coll. Barg. Ag.)

The CBA assignment is typically performed during the **Hire** process. If changes need to be made after that point the **Assign Collective Agreement** task is used.

Here are the steps to Assign a CBA to an employee:

- In the Workday Search bar enter “ass col agr”.
- Click on the **Assign Collective Agreement** task in the results returned.
- Update the **Effective Date** if it differs from the date already filled in.
- Select the **Employee** from the list provided.
- Click **OK**.
- Select the **Collective Agreement** to be assigned to the selected employee.
- Click **Submit**.
- Click **Done**.

  Note: This will take you to the **Manage Union Membership** page.

6. Manage Union Membership

The Manage Union Membership is where the Union is assigned to the new hire's record. is typically performed during the **Hire** process. If changes need to be made after that point the **Manage Union Membership** task is used.

Here are the steps to Define the Union Membership for the New Hire:

- On the **Manage Union Membership** pop-up screen that appears select the appropriate Union from the list provided.
- Click the **OK** button.
- On the next page enter the **Union Seniority Date**, which is their first day of work.
- In the blank row of the **Membership Information** grid enter the **Start Date**.

  Note: This will be the same date that was entered in the **Union Seniority Date** field.
- Next, select the Type of union the new hire will be part of.
- Note: The "Dues Paying" option is for Full-time employees and the "Non-Dues Paying" option is for Temporary employees.
- In the **Related Position** field, select the new hire's position.

  Note: The position will be prefilled based on the information associated with the position the person is being hired into.
- Click the **Submit** button.

  Note: This will take you to the **Propose Compensation** page.

7. Propose Compensation

The Propose Compensation task is a subprocess within the Hire process. Compensation is typically generated at the time the position is created. If there is a need for compensation for a position to change, the following task can be performed.

Here are the steps to perform to propose a compensation change for a position tied to a specific employee:

- In the Workday Search bar enter “req com cha”.
- Click on the **Request Compensation Change** task in the results returned.
- Enter the **Effective Date** of the change.
- Select the **Employee** from the list provided.
- Click **OK**.
- Fill in the appropriate fields (* indicates a required field).
- Click **Submit**.
- Click **Done**.

Note: This request needs to be approved by the Compensation Partner, followed by Labor Relations and Civil Service.

Note: This will take you to the **Change Personal Information** page.

8. Change Personal Information

The Change Personal Information task Collects information about the new hire that Workday requires to complete their employee record.

Here are the steps to perform to update the change personal information section for a specific New Hire:

- On the **Change Personal Information** screen select the appropriate **Gender** for the New Hire.
- Now, enter the new hire's birth date in the **Date of Birth** field.
- Click the **Submit** button.

  Note: After this step is completed, the New Hire process will send approval requests to the following four departments – Civil Service, Labor Relations, Audit and Control, and Budget. Once these four groups approve the new hire request, the process will continue.

  Note: If this hire is for a previous employee that worked for the County more than three years ago then the **Complete I-9** task is next. If this is for a first-time County employee, then the Complete I-9 task will be part of their Onboarding process. In that case, the next step will be to **Add Roster Info**.

9. Complete I-9

Use Form I-9 to verify the identity and employment authorization of individuals hired for employment in the United States. All U.S. employers must properly complete Form I-9 for each individual they hire for employment in the United States. This includes citizens and noncitizens. This is typically done during the Onboarding process but can also be run as a stand-alone process.

Here are the steps involved in completing this process:

- In the Workday Search bar enter "com i-9".
- Click on the **Complete Form I-9** task in the results returned.

Note: The first page should display the employee's name in the worker field.

- Click **OK**.
- Fill in the appropriate fields (* indicates a required field).
- Click **Submit**.
- Click **Done**.

Note: This request is sent to the HR Partner for review and approval.

10. Add Roster Info

During the Hire Business process for all Regular or Temporary Employees, a required To-Do will be raised to the HR Partner. This To-Do will state that the Employee's Roster History needs to be updated.

Here are the steps involved in completing this process:

- In the Workday Search bar, the HR Partner enters the employee's (new hire) name.
- In the results returned click on the employee's name**.** This will take you to the employee's profile.
- Click on the Actions button and scroll down the menu to the **Additional Data** item.
- Hover over the Additional Data menu item and then click on the **Edit** menu item to the right.

  Note: You will be presented with the **Edit Additional Data** screen.
- Select **Roster History** in the **Custom Object** list provided.
- Click **OK**.

  Note: You will now be presented with the Edit Roster History screen to add a data entry row.
- Fill in the appropriate fields (* indicates a required field).
- Click **OK**.
- Click **Done**.

  Note: At this point, the HR Partner needs to navigate back to the To-Do item and click **Submit** to signify that it was completed.

11. Add Probation Period

There are times when a new hire is assigned a probationary period. This assignment is entered and managed within Workday. The following steps outline how to assign this to a new hire.

Here are the steps involved in completing this process:

- In the Workday Search bar enter “add pro per”.
- Click on the **Add Probation Period** task in the results returned.

  Note: This will also show up as an optional task in the Hire Business Process.
- Select the employee you are looking to add the probationary period to.
- Click **OK**.
- Fill in the appropriate fields (* indicates a required field).
- Click **Submit**.

Note: Once the Roster Info is saved the HR Partner needs to navigate back to the To-Do item and click **Submit** to signify that it was completed.

12. Onboarding Setup

The Onboarding task that is part of the Hire process allows the HR partner to specify people to notify about the hire and alert them that the new hire may be reaching out to them. Also on this setup page, you can specify people within the County that would be helpful contacts for the new hire. Both groups will be notified via email. The subject line and the body of the email are also defined using this page.

Once the **Submit** button is clicked on this page these emails will be sent to the identified recipients.

Note: Upon completion of this step the HR partner will find that the next task in their Inbox will be the **Assign Work Schedule** task.

13. Assign Work Schedules

As part of the New Hire business process, as well as the Change Job process, the HR partner will assign the employee a work schedule. This will define the number of hours the employee works in a week as well as the specific hours they work each day. The work schedule will also define their lunch break, and whether any portion of their workweek is considered flex-time. During these processes, the Assign Work Schedule task will be presented as a To-Do.

Note: This task can also be accessed by using the search bar and entering "assi wor sch". If accessing the task in this manner the employee's name will have to be entered on the initial screen. If accessed via the New Hire or Change Job processes the employee name will be prefilled.

Here are the steps involved once the Assign Work Schedule screen is displayed.

- If not already filled in select the **Worker** you are assigning a work schedule to.
- Enter the **Start Date** of when the schedule will take effect.

  Note: If this assignment is temporary an **End Date** can also be entered.
- Select the appropriate **Work Schedule Calendar** for the employee.
- Click **OK**.

Note: Upon completion of this step the HR partner will find that the next task in their Inbox will be the **Assign Pay Group** task.

14. Assign Pay Groups

The steps involved to Assign a Pay Group to an employee are documented in the **Staffing** job aid (SC-CM-TRN-034 Job Aid – Staffing). Please review that document for further details.

Note: Once this task has been completed it will trigger a series of Onboarding tasks that will be sent to the New Hire's Workday Inbox.

Important: As the new hire completes their Onboarding tasks that action generates tasks assigned to the HR Partner. The HR Partner must review the contents of each task and approve them for the information to take effect in Workday.

15. Complete Benefits Enrollment

As part of the New Hire business process, the employee is to complete their initial benefit elections. They will receive a "New Hire" task in their Workday Inbox that they are to complete within their first 30 days of employment. If no action is taken by the employee, the Workday system, by default, will enroll the employee in health benefits.
Note: If the employee plans to cover dependents with their benefits they will need to add those dependents to Workday first before they assign coverage to them.
Note: The Benefits Job Aid (SC-CM-TRN-026 Job Aid – Benefits) contains detailed instructions on how to both manage dependents as well as enroll them in the benefits offered by the County.

16. View Remaining Tasks of a Business Process for a Pre-Hire

During the hiring process, there are several Business Processes that are executed involving the new employee (Pre Hire) in question. While still in the "Pre-Hire" phase the only means to access the new employee's Workday record is by accessing it via the staffing tab of the Supervisory Organization the new employee is being hired into.

For those business processes that are not already complete several important pieces of information may need to be understood by the Payroll Rep. Those pieces of information would include; what tasks have been completed, what tasks remain, and who is responsible for completing the task that is currently in process. This will allow for proper follow-up and accurate status updates.

The steps required to view the current state of a business process for a Pre-Hire are as follows:

1. In the Search bar enter the name of the Supervisory Org the New employee is joining.
2. Click on the Supervisory Org from the list of returned results.
   Note: This will take you to the Supervisory Orgs Profile page.
3. Click on the **Staffing** menu item.
4. Scroll down to the section that is titled **In Progress Staffing Actions**.
5. Continue to scroll until you find the row with the new employee's name listed on it.
6. Click on the business process listed to the left of the employee's name to view the details.
7. On the next page click on the **Process** tab.
8. This will provide a list of the tasks that make up the selected business process.
9. Scroll through the list toward the bottom, paying careful attention to each row's value in the **Status** column.
   Note: If the Business Process has not been completed the last task in the list will be listed with the status of "Awaiting Action". In the **Person** column for that task, you will find the name of the person(s) who are responsible for completing the task.
   Note: If there are more tasks beyond that one, you will find a **Remaining Process** button at the bottom of the page. Clicking on that button will display the remaining tasks to be performed along with the person(s) responsible for completing each task.
10. Once you have completed your review of the remaining tasks click on the Workday symbol at the top left of the page to return to the Homepage.

17. Split Position Processing

There are times when a single full-time position would be best served by two or more individuals. In situations like this, a position needs to be "split" into multiple part-time positions, all totaling up to the same number of hours that the full-time position held.

A "-#" is added to the end of a position number to identify that the position is filled by more than one worker. The "#" starts with "1" and continues sequentially.

The steps required to split a full-time position into multiple part-time positions are as follows:

Note: These first steps are performed by someone in the Budget Office (e.g. Kelly Tinn)

1. On the Workday Search bar find the **Create Position** task and click on it.
2. On the first popup window select the **Supervisory Org** that the position resides in.
3. Click the **OK** button.
4. On the next page (**Create Position**) select "Split Position" as the **Position Request Reason**.
5. Now enter the **Job Posting Title**.
6. Then enter the number of additional positions to be created in the **Number of Positions** field.
   Note: The original position is not included. If you want a total of 4 split positions you would enter 3 here.
7. Now enter the **Date** the positions are available.
8. Also, enter the **Earliest Hire Date**.
9. Select the **Job Profile** for the position in question in the **Job Profile** selection list.
   Note: The **Job Description** will typically populate once the **Job Profile** is selected.
10. Now select the **Location** where this position will reside.
11. Next, select the "Employee" option for the **Worker Type** field.
12. Then select "Regular" for the **Worker Sub-Type** field.
13. In the **Comment** field for the **Create Position** task store the **Original Position Number** for reference later.
14. Click the **Submit** button to process the information entered on this page.
    Note: At this point, the budget person will see that the **Compensation Partner (CP)** needs to complete the next step.
15. The budget person will click the **Done** button to end their work for now.

Note: These next set of steps are performed by the **Compensation Partner.**

1. In the CP's **Workday Inbox,** they will find a **Default Compensation Change** task.
   Note: Most times the information needed will default in and populate much of the page.
2. Review the contents of the page, fill in any information that is missing, and update any incorrect information.
3. In the **Comment** field at the bottom of the page enter the **Position ID** of the position that is being split.
4. Now click the **Approve** button.
5.

Note: The **Budget Office** will perform the next set of steps in the process.

1. In the Budget Office's **Workday Inbox,** they will find an **Assign Organizations: Create Position** task.
2. The first step is to select the appropriate **Company** from the list provided (e.g. County of Suffolk).
3. Now enter the **Cost Cente**r associated with this position.
4. Enter any additional details.
5. Click the **Submit** button.

Note: The **HR Administrator** will perform the next set of steps in the process.

1. In the HR Administrator's **Workday Inbox,** they will find an **Edit Reference ID** task.
   Note: This is a "To Do" type of task.
2. Review the overall process (**View Event - Create Position**) to identify the positions created from the split positions task.
   Note: The **HR Administrator** should write down the **Position Numbers** listed as they will be needed in the coming steps (Need to update their Reference_IDs).
3. Now, click on the **Process tab** and find the **Change Default Compensation** step.
4. In the **Comment** column for that row, read the **Position (Reference ID)** and write it down.
5. Now go back to the **To Do (Edit Reference ID)** in the Workday Inbox.
6. Click on the **Edit Reference ID** button.
7. On the popup that appears enter the **Reference ID** that was found in the **Comment** field earlier (Position).
8. Click the **OK** button.
9. On the **Edit Reference ID** page update the **Reference ID Value** by adding a "-#" to the end of the **ID**.
   Note: Assign the max number of splits to the Original Position. If the position had three additional splits added to it, then the "-#" added here would be "-4".
10. Click the **OK** button.
11. Click the **Done** button.
    Note: This will take you back to the Workday Inbox where the **Edit Reference ID** task is listed.
    Note: In the step above (See highlighted section) is where the **Position Numbers** of the **Split Positions** were written down. You will now use those numbers and edit their **Reference IDs**.
12. Click the **Edit Reference ID** button.
13. In the Pop up that displays enter the first **Position Number** that was written down into the **Reference ID Value** field.
14. Click the **OK** button.
15.

16. On the next page type over the **Reference ID Value** and use the **Original Reference ID** followed by the "-#" suffix. The number must match the "-#" located in the title of the page.
17. Click the **OK** Button.
18. Click the **Done** button.
    Note: Repeat this process for all remaining **Split Position** numbers written down earlier.
19. Once all of the **Split Positions** are updated, click the **Submit** button.
    Note: This will return us to the Workday Inbox where the **Edit Reference ID** task is listed.

    Note: Up next will be a **To-Do** task for the **Budget Office**.

1. In the Budget Office's Workday Inbox, they will find an **Edit "Suffolk County Position Details" Custom Object: Create Position"** task.
   Note: Position History is being updated here.
2. Click the link next to the "Complete To Do" label at the top of the page.
3. On the next page click the **To Do** button in the **My Actions** section.
4. Search for the original **Position Number**.
5. Under the **Staffing** category, you will find the split positions listed.
6. Click on the **Related Actions** (**Twinkie)** next to the first position listed.
7. On the menu click on the **Additional Data** Menu item, followed by the **Edit** Sub-Menu item.
8. On the next pop up select "Suffolk County Position Details" as the **Custom Object**.
9. On the **Edit Additional Data** page, click on the plus sign to add a row in the **Suffolk County Position Details** grid.
10. Fill in the row with the appropriate information for the split position selected.
11. Click the **OK** button once the row is populated.
12. Once all split positions are processed, you will be taken back to the Workday Inbox.
13. Click the **Submit** button to complete the process.

This completes the steps involved in creating a Split Position in Workday using "-#" suffixes to denote each split.

Change Log

Revision Number	Date of Change	Affected Lesson	Action	Initials
1.1.1.1	09/15/2021		Log Created	RK
1.1.1.2	2/4/2022	View Remaining Tasks of a Business Process for a Pre-Hire	Lesson Added	Rk
1.1.1.3	3/16/2023	Multiple	Reorganized Lessons and added several new ones	RK
1.1.1.4	5/15/2023	Add Lesson – Split Position Processing	Lesson Added	RK