

TRANSITION TO



Human Resources • Payroll • Finance

Increase Efficiency • Improve Operations

**WORKDAY
PARTNERS
TRAINING
GUIDE**



May 2023

INDEX



SECTIONS

- **HCM Training Material**
- **Time Tracking, Absence & Payroll Training Material**
- **Benefit Training Material**
- **Job Aids**
 - *Manager*
 - Manage Employee Time
 - Manage Employee Time Off
 - *Department HR Partner*
 - Hire Employee (Manual Hire)
 - Job Changes
 - Compensation Change
 - Create and Maintain Position
 - Employee Termination
 - *Employee*
 - Basic Navigation
 - Enter Time
 - Request Time Off
 - Manage Your Benefits
 - View Payslip & Manage Elections
- **Scenarios**
 - HCM
 - Benefit
 - Payroll
- **Workday Partner Checklist**



HCM Scenarios

- Create a permanent full-time position and hire an employee
- Create a part-time position and hire an employee
- Create a provisional/full-time position and hire an employee
- Proxy as a new hire, complete onboarding tasks and process I9 for new hire
- Create rehire
- Close part-time position
- Report no show
- Job change with reason: *promotion*
- Job change with reason **demote voluntary**: *decrease in responsibility*
- Job change with reason **demote involuntary**: *decrease in responsibility*
- Job change with reason: *make a new manager*
- Job change with reason: *employee type change*
- Job change with reason: *move to new manager within the department*



HCM Scenarios

- **Job change with reason:** *department initiated a transfer*
- **Job change with reason:** *change business title (ex. department name)*
- **Job change with reason:** *change location*
- **Job change with reason:** *terminate an employee (voluntary)*
- **Job change with reason:** *terminate an employee (involuntary)*
- **Menu Item Personal:** *Edit IDs: add driver's license information*
- **Menu Item Personal:** *Edit name: change the legal name of employee*
- **Menu Item Personal:** *Edit name: change the preferred name*
- **Menu Item Contact:** *Edit contact: change address and phone number*
- **Menu Item Contact:** *Edit emergency contacts: add or change emergency contact*
- **Request Compensation Change:** *Special Merit Increase*
- **Request One-Time Payment:** *Longevity Payment*



Benefit Scenarios

- Worker can enter Employee Loses Coverage QLE
- Worker can enter Employee Gains Coverage QLE
- Worker can enter Add Dependent QLE
- Worker can enter Drop Dependent QLE
- Worker can enter birth/adoption of a child
- Worker can enter Add Dependent QLE
- Spouse becomes a new hire; worker can enter Dependent Loses Coverage QLE
- Child becomes a new hire; worker can enter Dependent Loses Coverage QLE
- Worker can enter Retirement Change QLE
- Worker can enter Retirement Change
- Ben Partner or Admin can submit an admin correction for a worker to change benefit elections retroactively; ensure arrearages calculate correctly back to the coverage date
- Validate Current Elections is set to 'Yes' in Coverage history, and all plans are **reflected**. Ensure the auto-enroll plans (ex. STD, LTD, Basic Life) have been enrolled.



Benefit Scenarios

- **Verify that benefit coverage dates have changed as expected.**
- **Enroll the employee in all available plans.**
- **Validate Current Elections is set to 'Yes' in Coverage history, and all plans are reflected.** Ensure the auto-enroll plans (ex. STD, LTD, Basic Life) have been enrolled.
- **Ensure the auto-enroll plans (ex. STD, LTD, Basic Life) have been enrolled.**
- **Enroll the employee in all available plans.**
- **Ensure the employee has the option to enroll in benefits and enrollment can be completed successfully.**
- **Benefit Partner is able to waive benefits**
- **Change 401k, 457, and IRA contribution amounts**
- **Worker can initiate divorce - remove ex-spouse**
- **Worker can add a new baby**
- **Retiree turns 65 - elects medical/dental**
- **Worker can enter a marriage QLE and add a spouse and child/ren if applicable.**



Time Tracking & Absence Scenarios

Enter time for the worker *(Regular Pay, Over Time, Comp Time)*

- After entering and submitting the time for the worker run the pay calculation to confirm that the time you put in reflects correctly on the payslip.

Enter absence for the worker: *You will want to test each code that is available under Time Off*

- After entering and submitting Time Off for the worker run the pay calculation to confirm that the Time Off you put in reflects correctly on the payslip.

Place worker on leave: *You will want to test each code that is available under Leave of Absence*

- After entering and submitting the Leave of Absence for the worker run the pay calculation to confirm that the Leave of Absence you put in is reflecting correctly on the payslip.

Enter Lump Sum Vacation: *(Hint, This will be entered through Payroll Input)*

- After entering the Lump Sum Vacation run the pay calculation to confirm that the Lump Sum Vacation is reflecting correctly on the payslip

Enter Lump Sum Sick: *(Hint, this will be entered through Payroll Input)*

- After entering the Lump Sum Sick run the pay calculation to confirm that the Lump Sum Sick is reflecting correctly on the payslip

Enter Comp Paid: *(Hint, this will be entered through Payroll Input)*

- After entering the Comp Paid run the pay calculation to confirm that the Comp Paid is reflecting correctly on the payslip

Enter Retro Time: *Enter Time for a worker for a previous pay period that will be paid out during the current pay period.*

- Once you have entered the time you will run a retro pay calculation for this worker. (You do not have to worry about marking the retro pay calculation as complete as this will be done at administration). Once you have verified that there is no error, you will then run the pay calculation so that this time adds to their current pay period.



Time Tracking & Absence Scenarios

Enter Retro Time Off: Enter a Time Off for a worker for a previous pay period that will be paid out during the current pay period. Once you have entered the Time Off, you will run a retro pay calculation for this worker. (You do not have to worry about marking the retro pay calculation as complete as this will be done at administration). Once you have verified that there is no error, you will then run the pay calculation so that this Time Off is accounted for in their current pay period.

Enter Retro Leave of Absence: Place worker on a Leave of Absence beginning in the previous pay period. (If the employee received regular pay you will need to remove that pay and replace it with available leave that the employee has selected.) Once you have entered the leave you will run a retro pay calculation for this worker. (You do not have to worry about marking the retro pay calculation as complete as this will be done at administration). Once you have verified that there is no error, you will then run the pay calculation so that this leave is accounted for in their current pay period.

Return worker from leave: Return the worker you put on a Retro Leave of Absence in the current pay period.

Run Payroll Audit: This report will let you know who has zero hours of pay

Run the Workers with Un-submitted Time Report: Run this report to see if any workers in your department have put the time in their timesheet but have not submitted it to their managers

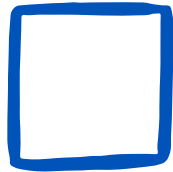
Correct Time Off: Change the dates or time of a Time Off for a worker that has been submitted. You will need to proxy as the employee to submit this request and then correct it as yourself to ensure you have the ability to do this transaction.

Correct Leave of Absence: Change the date of a Leave of Absence for a worker that has been submitted. You will need to proxy as the employee to submit this request and then correct it as yourself to ensure you have the ability to do this transaction.

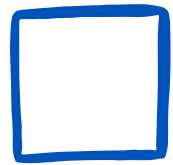
Correct time entered: Proxy as an employee in your department and submit regular hours. Stop the proxy and correct the time as yourself to ensure you have the ability to do this transaction.



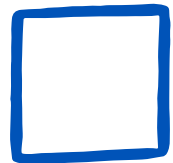
HR/Benefit/Payroll Partner Checklist



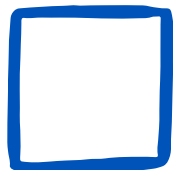
Continue to test scenarios and identify any issues.



Remind managers to periodically check notifications for any approvals in process.



Train managers on time-keeping and absences (see My Team worklet to review time entry and time-off for employees). **Managers: Send a confirmation email to Kathy that you received training.**



Remind managers to periodically review employee time.

Complete all testing and report any issues by **June 2, 2023**

