

Department of Administrative Services



Workday Foundations

Agenda

1. Introduction
2. Series Overview
3. Worker Data
4. Hire Process
5. Audits and Reporting
6. Close



Introductions



Data Integrity Team

- Ryan Englund
- Libbie Saunders

Recruitment SME

- Margo Hammonds

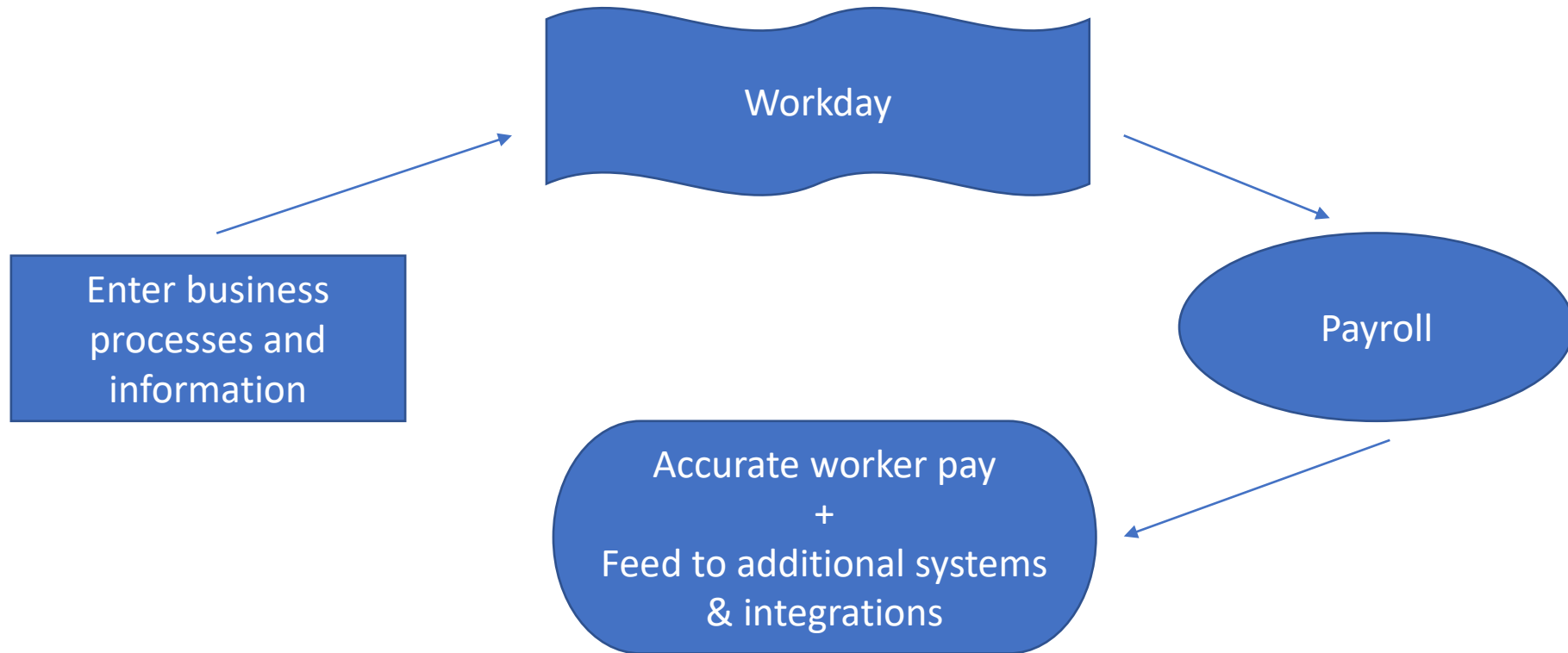
What do we do?



- We ensure proper entry into Workday
- We help verify payroll Data
- We troubleshoot errors in Workday

- We assist in large scale changes such as COLA administration, bargained changes, and allowance updates
- We help educate Agencies on the correct business process for making changes, and corrections.
- We work with multiple divisions on data integrity such as PERS, Payroll, Budget, and Position management.

What do we do?



Workday Foundations



Data Integrity Team Workday Foundations



- **Worker Data**
- **Hire Process**
- Job Change
- Additional Jobs
- Compensation Change
- Terminations



Prior to starting the hire

- Requisition Details
- Check Position & Compensation Data
- Check Candidate Data (Look for duplicates)
- Review Offer
- Verify Start Date
- Start Hire



Requisition Details

Blue – Primary Details
Changing these after
the req is built can
cause hiring issue.

Red - Double check
that your position and
job profile match,
unless you are hiring
an under or overfill.

Won't be able to hire
prior to the Recruiting
Start Date. Give
yourself wiggle some
extra room.

Requisition Details		Hiring Requirements	
Job Requisition	REQ-146463 OPA 3 (Open)	Job Details	
Supervisory Organization	CHRO Information Management - DAS	Job Profile	Operations & Policy Analyst 3 - SR30 - Exempt
Number of Openings	0 available 1 unavailable 0 filled 1 total	Job Families for Job Profiles	Operations & Policy Analyst
Position	Operations & Policy Analyst 3 - SR30 - Exempt	Worker Sub-Type	Permanent
Internal Movement Only	No	Worker Type	Employee
Referral Payment Plan	(empty)	Time Type	Full time
Available for Overlap	No	Compensation Grade	30
Available For Hire	No	Primary Location	Salem DAS Executive Building
Hiring Freeze	No	Primary Job Posting Location	Salem DAS Executive Building
Requester	Twyla Lawson	Additional Locations	(empty)
Job Application Template	Job Application Default Template effective 11/21/2023, 3:20 PM	Additional Job Posting Locations	(empty)
Candidate Ranking Template	(empty)	Scheduled Weekly Hours	40
Primary Internal Questionnaire	(empty)	Work Shift	(empty)
Secondary Internal Questionnaire	(empty)	Recruiting Start Date	01/12/2024
Primary External Questionnaire	(empty)	Application Deadline	01/22/2024
Secondary External Questionnaire	(empty)	Target Hire Date	(empty)

Duplicates

Previous Worker vs Current Worker



<input type="checkbox"/>	Job Application	Step / Disposition	Awaiting Me	Awaiting Action	Employee ID (Previous or Current Worker)	Employee Type (Internal Candidates Only)	Requested Veteran Points	Veterans Points Awarded	Possible Duplicate
<input checked="" type="checkbox"/>	• Dan (CAND-)	Review		9	OR21		No	0	Yes

Previous worker who has not yet been merged.

<input type="checkbox"/>	Job Application	Step / Disposition	Awaiting Me	Awaiting Action	Employee ID (Previous or Current Worker)	Employee Type (Internal Candidates Only)	Requested Veteran Points	Veterans Points Awarded	Possible Duplicate
<input type="checkbox"/>	Margo Hammonds (CAND-398393)	Review		4	OR00		No	0	Yes

Current worker who applied through the external career site.

Research and act on candidates you plan to hire.



Prior Worker - Merge candidate profile view

Look for a Terminated Worker record.
Never merge with Contingent Worker records.
There is no terminated worker in this example.

The screenshot shows a candidate profile for Mickey Mouse (CAND-396156) for position REQ-145561 Fiscal Analyst 2. The left sidebar contains navigation options: Summary, Overview (highlighted with a red box and a red circle with the number 1), Recruiting History, and Questionnaire Results. The main content area has tabs for Overview, Personal Information, Duplicates (highlighted with a red box and a red circle with the number 2), Application Changes, and Candidate Communication. Under the Duplicates tab, there is a section for 'Potential Duplicates' with 2 items. A table lists these duplicates with columns for Type, Name, Match Reasons, Merge, and Remove. Below the table is a 'Merge with Other' button, also highlighted with a red box.

Type	Name	Match Reasons	Merge	Remove
Candidate	Mickey Mouse (CAND-16041)	Mickey Mouse 2008 2011 2014	Merge	Remove
Candidate	Minnie Mouse (CAND-93698)	M Mouse 2008 2011 2014	Merge	Remove

Merge with Other

Prior Worker - Merge candidate profile view



Look for a Terminated Worker record.
Look for DOB and SSN Match Reasons.
This is an example of a good match.

Overview Personal Information **Duplicates** Application Changes Candidate Communication

> Previous Worker Identification

Potential Duplicates 2 items

Type	Name	Match Reasons	Merge	Remove
Employee	[Redacted] (Terminated)	Exact National ID match [Redacted] Previous Worker ID 267 [Redacted] Date of Birth match	Merge	Remove

Prior Worker – Merge



Some candidates have more than one external profile, and a prior worker profile can be created from the terminated worker record. Both records can be associated with the same SSN if the offer process was done on the external candidate profile. You'll need to link the additional profile to the terminated worker record.

The screenshot shows a list of two candidate entries. Each entry consists of a small icon of a document with three horizontal lines, followed by the candidate's name and status. The first entry is "Heidi [redacted] (Prior Worker) (CAND-[redacted]) Candidate" and the second entry is "Heidi [redacted] (CAND-[redacted]) Candidate".

- Heidi [redacted] (Prior Worker) (CAND-[redacted])
Candidate
- Heidi [redacted] (CAND-[redacted])
Candidate

Current Worker Applied Externally – Disposition



This is an example of a current worker who applied to the external career site, instead of through their worker account.

<input type="checkbox"/>	Job Application	Step / Disposition	Awaiting Me	Awaiting Action	Employee ID (Previous or Current Worker)	Employee Type (Internal Candidates Only)	Requested Veteran Points	Veterans Points Awarded	Possible Duplicate
<input type="checkbox"/>	Margo Hammonds (CAND-398393)	Review		4	OR00 [REDACTED]		No	0	Yes

Current Worker Applied Externally – Disposition



Current workers who apply externally do not get merged

Disposition the external record

Manually create the internal application

Current workers need to be job changed using their internal profile.

The screenshot displays a user profile for Margo Hammonds (CAND-398393) for the position of Group Life Coordinator 2 Pool - Tillamook Youth Correctional Facility (Evergreen). The interface includes a navigation menu on the left with options for Actions, Summary, Overview, and Recruiting History. The main content area shows the 'Duplicates' tab, which lists potential duplicates. A table with two rows is shown, with the 'Merge' button for the first row highlighted in red.

Type	Name	Match Reasons	Merge	Remove
Employee	Margo Hammonds	Margo Hammonds Previous Worker ID 508 [redacted] [redacted]@msn.com Department Of Administrative Services	<input type="button" value="Merge"/>	<input type="button" value="Remove"/>
Candidate	Melissa Hammonds (CAND-297156)	M Hammonds	<input type="button" value="Merge"/>	<input type="button" value="Remove"/>



Questions?



Review Offer

Double check offer letter details; start date, job profile, compensation, etc.
Search for candidate profile “Cand:FirstName LastName”

(Internal)

Phone Number
+1 (541) [redacted] (Work - Cell Phone)

Jobs Applied to
6

From the candidate profile, click on the Jobs Applied to link (the number)

6 items

Job Application Date	Job	Location	Stage	Step	Source		
10/25/2023 11:27:28 AM	REQ-141002 Child Welfare Supervisor 2 (Filled)	Grants Pass DHS Hawthorne	Ready for Hire	Completion	Internal -> Current Worker	View Application	View Business Process Event History
09/21/2020 08:03:38 AM	REQ-48187 Office Manager 2 - Agency Only (ODHS) (Filled)	Grants Pass DHS Hawthorne	Ready for Hire	Completion	Internal -> Current Worker	View Application	View Business Process Event History

Find the requisition

Click on View Business Process Event History

Review Offer



Click on the Process tab and then Generate Document
Managers, Recruiters, HR Partners and HR Assistants can review offer documents

Process History 55 items

Process	Step	Status	Completed On	Due Date	Person (Up to 5)	All Persons	Comment
Offer	Offer	Submitted	01/03/2024 04:32:48 PM		[Redacted] (Manager)	1	
Propose Compensation Offer/Employment Agreement	Offer Compensation to the Candidate	Submitted	01/04/2024 05:34:18 AM		[Redacted] (Compensation Partner)	1	
Propose Compensation Offer/Employment Agreement	Approval by Manager	Approved	01/04/2024 08:33:27 AM	01/06/2024	[Redacted] (Manager)	1	
Generate Document	Send Offer Letter to Candidate	Submitted	01/04/2024 11:31:02 AM		[Redacted] (Manager)	1	
Offer	Your Offer Letter	Step Completed	01/04/2024 03:08:11 PM		[Redacted] (CAND- [Redacted] ?)	1	[Redacted] : I Accept the offer
Offer	Provide Your DOB, Gender, Ethnicity and Military Status	Step Completed	01/04/2024 03:09:00 PM		[Redacted] (CAND- [Redacted] ?)	1	

Worker Data Entry – Offer process



Anakin Skywalker - Candidate Home

My Tasks (3)

Please complete your pending tasks to continue forward in the selection process.

Your Offer Letter
Job: Operations & Policy Analyst [Start](#)

Provide Your DOB, Gender, Ethnicity and Military Status
Job: Operations & Policy Analyst [Start](#)

Provide Your Social Security Number
Job: Operations & Policy Analyst [Start](#)

- Using the offer process ensures the data comes from directly from the worker, providing a much less chance for errors.
- 1st round for SSN entry by the worker is during the offer process, the I9 is the 2nd defense against inaccuracy.



Ready for Hire

Once a candidate is moved to Ready for Hire, the recruitment process is complete, and the hire process begins.

Complete the hire from the inbox task to help prevent errors.

The screenshot displays a recruitment system interface. On the left, under "All Items" (29 items), a search bar is present. Below it, an "Advanced Search" link is visible. A task card is highlighted with a red border, showing: "Hire: Lucy Diamond - [redacted] 02/05/2024 ☆", "Program Specialist (AS2) - Limited Duration", and "Effective: 02/12/2024".

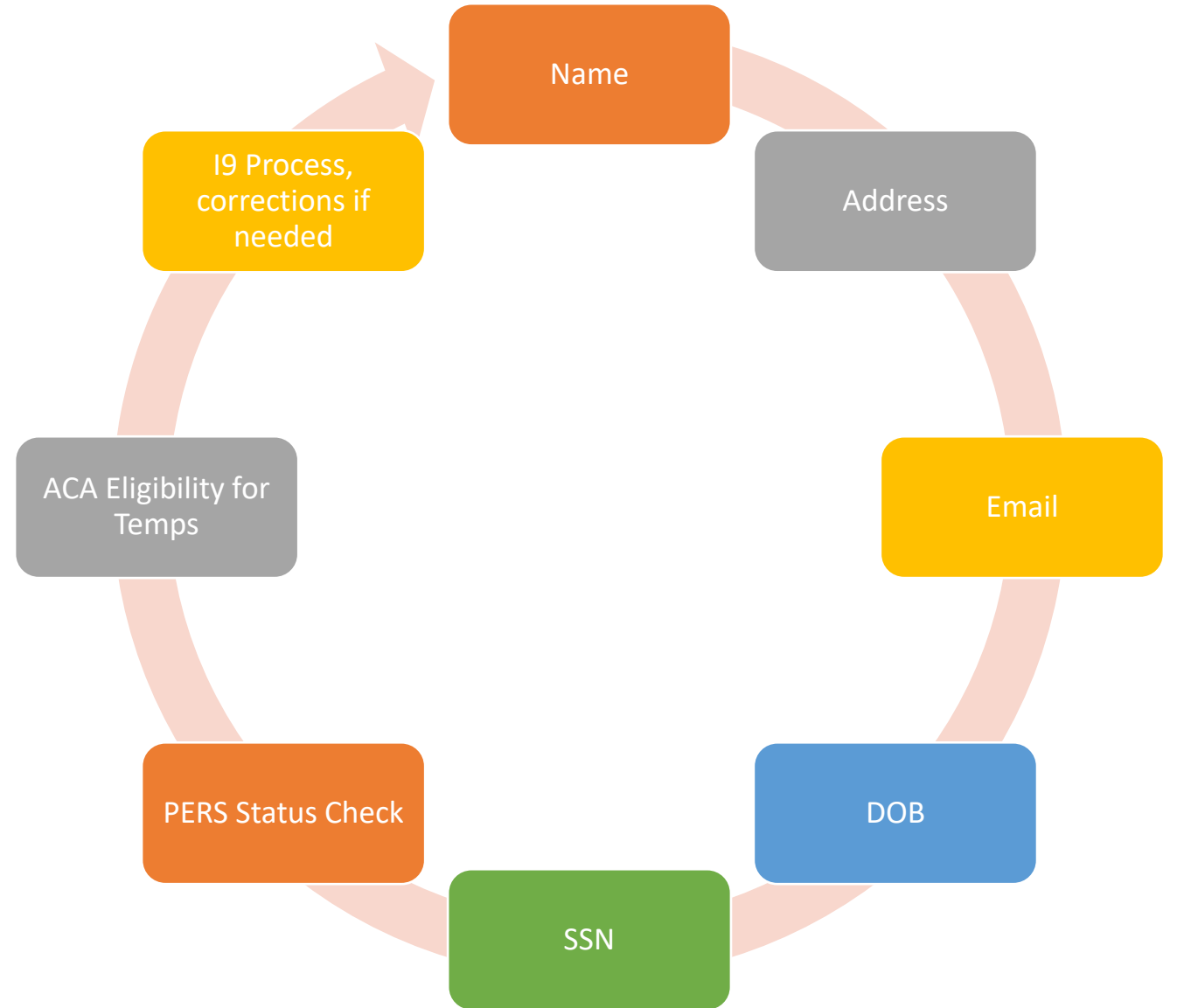
The main content area is titled "Revise Employee Hire" for "Lucy Diamond" (with a redacted name) at "OHCS". It includes a star icon and a list icon. The details are as follows:

- Created: 02/05/2024 | Effective: 02/12/2024
- Hire Date: * 02/12/2024 (with a calendar icon)
- Reason: * x Hire Employee > New Hire (with a menu icon)
- Initiated From: Job Application: Lucy Diamond - REQ-[redacted] Program Specialist (AS2) - Limited Duration (CAND-241117) on 02/05/2024
- Job Details section:
 - Position: * x [redacted] Program Specialist (AS2) - Limited Duration (with a menu icon)



Questions?

Worker Data



Data Integrity Team Workday Foundations



- Worker Data
- **Hire Process**
- Job Change
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PERS Status Checks



When using the offer process, SSN is provided and available for a status check

Work with Payroll to ensure only one Status check is requested by Agency.
Establish process for either Payroll or HR to obtain and share information.

PERS Status Check



Revise Employee Hire Mickey Mouse Accounting & Finance

Created: 01/11/2024

Hire Date * MM/DD/YYYY

Reason *

Initiated From Job Application: Mickey Mouse - REQ-145561 Fiscal Analyst

Job Details

Position *

PERS Status Check: 1-888-320-7377

Name	Address	Phone	Nat
Mickey Mouse	1234 Save, Salem, OR 97306 United States of America	+1 (503) 5605555	

PERS Status Check



Enter response from PERS Status Check

Worker Profile – Personal > Additional Data

PERS Status Check

PERS Contribution Start Date (empty)

Edit

PERS Pickup (AA to AP, etc) won't automatically happen unless you enter the Contribution Start Date that you receive from your PERS Status Check. If you don't enter this on their record, you will have to manually add the PERS Pickup

If your new hire is PERS eligible upon hire, you can skip this

Position Data vs Worker Data



Begin Hire



Revise Employee Hire

Mickey Mouse



Accounting & Budgeting - DAS



Created: 01/11/2024

Hire Date *

MM/DD/YYYY



Reason *



Initiated From

Job Application: Mickey Mouse - REQ-145561 Fiscal Analyst 2 (CAND-396156) on 01/11/2024

Job Details

Position *



Intended Job Requisition

REQ-145561 Fiscal Analyst 2 (Open)

Employee Type *



Job Profile *



x Fiscal Analyst 2 - SR27 - Exempt



Time Type *



Location *



x Salem | DAS | Executive Building



Working Time

Scheduled Weekly Hours

40

FTE

100%

Work Shift



Position Data



- Supervisory Organization
- Company (aka Agency)
- Cost Center – Default
- PERS Class
- Position Representation
- Employee Type
- Job Profile
- Location

Position [HR Information Systems Manager - Twyla Lawson](#) ⋮

Supervisory Organization [CHRO Workforce Development - DAS](#)

Position Restrictions [HR Information Systems Manager - Twyla Lawson](#)

Organization Assignments [Company: Department of Administrative Services](#)
[Cost Center: 4516100000](#)
[PERS Position Classification: General Service Qualifying Position](#)
[Position Representation: Management Service - Supervisory](#)

Worker [Twyla Lawson](#)

Job Details

Employee Type [Permanent](#)

Job Profile [Principal Executive/Manager F - SR35 - Exempt](#)

Job Title [HR Information Systems Manager](#)

Business Title [HR Information Systems Manager](#)

Time Type [Full time](#)

Location [📍 Salem | DAS | Executive Building](#)

Pay Rate Type [Salary](#)

Job Exempt [Yes](#)

Management Level from Job Profile [Management](#)

Working Time

Location Weekly Hours 40

Default Weekly Hours 40

Scheduled Weekly Hours 40

FTE 100%

Work Shift (empty)

Job class codes



Additional Information

Job Title

Fiscal Analyst 2 - SR27 - Exempt

Business Title

Fiscal Analyst 2 - SR27 - Exempt


Management Level from Job Profile Non-Management

Additional Job Classifications

*

First Day of Work

*

MM/DD/YYYY 

Continuous Service Date


*

MM/DD/YYYY 

End Employment Date


MM/DD/YYYY 

Benefits Service Date

MM/DD/YYYY 

Company Service Date

*

MM/DD/YYYY 

Job Class Codes



Additional Information

Job Category	General
Job Classifications	Officials and Administrators - Upper Management (SR 31+) (EEO-4 Job Categories) S - SEMI-INDEPENDENT AGENCY (06. Service Type Code) X - EXCLUDABLE MANAGEMENT SERVICE - CONFIDENTIAL (06. Service Type Code) X - EXCLUDABLE MANAGEMENT SERVICE - MANAGERIAL (06. Service Type Code) X - EXCLUDABLE MANAGEMENT SERVICE - SUPERVISORY (06. Service Type Code) Z - EXCLUDABLE UNCLASSIFIED (06. Service Type Code)
Additional Job Classifications	.N - Default (02. Timesheet Code) G - General Service OPSRP (05. PERS Class Plan) N - No (03. Overtime Eligible) O - Observed (04. Holiday Code) S - Salaried (01. Pay Basis Code) X - EXCLUDABLE MANAGEMENT SERVICE - SUPERVISORY (06. Service Type Code)
Company Insider Types	(empty)
Workers' Compensation Code from Job Profile	8810 - Office (United States of America)
Workers' Compensation Code Override	(empty)
End Employment Date	(empty)
Available For Hire	
Hiring Freeze	
Exclude from Headcount	No

Required

Pay basis

Overtime

Holiday

PERS Class Plan

Service Type

Timesheet

Optional Codes

Concurrent job

Job Share

Underfill

Internship



Add SSN (if you did not go through offer)

Edit Government IDs Mickey Mouse

Proposed IDs

National IDs 1 item

	*Country	*National ID Type	Current ID	Add/Edit ID	Issued Date	Expiration Date	Issued By	Series	Verification Date
⊖	United States of America	Social Security Number (SSN)		543-21-0000	MM/DD/YYYY	MM/DD/YYYY			01/11/2024

Add personal information

(if you did not go through offer)



Required

- Gender
- DOB
- Race/Ethnicity

Optional

- Gender Identity
- Pronoun

Propose Compensation hire



Propose Compensation Hire Correctional Counselor (Salem) (Unfilled)

Compensation

Effective Date & Reason

Effective Date: 02/12/2024

Reason: Hire Employee > Hire Employee > New Hire

Guidelines

Total Base Pay Range: 5,749.00 - 8,380.00 USD Monthly

Compensation Package: General Compensation Package

Grade: 26

Grade Profile: CP-26-AA (1)

Step: Step 03 - 6,313.00 USD

Progression Start Date: 02/12/2024

Salary

Assignment Details

6,313.00 USD Monthly

Plan Name

Monthly Salary Pro Rated if Less than Full Time

Effective Date

02/12/2024

Add

Allowance

Add

Associated roles – Hire Tasks



- Compensation Partner – Enter/review compensation hire
- Agency Payroll Partner – Assign Work schedule
- HR Partner – Ready for hire, hire process
- Current Manger – Once hire is complete, manager will see worker

I9 Process



- Worker I9 – Onboarding
- Worker completes section 1 on 1st day of employment, and the rest needs to be complete no later than their 3rd day.
- HR completes section 2 by physically reviewing documents as acceptable. Only exception is full-time remote workers with E-Verify agencies
- Verify SSN match with I9 and SSN provided by worker
- SSN Correction @ I9 (or anywhere when discovered)

What to do after you have done it all



If you discover a mistake – Things **YOU** can correct

Job Details (Edit Position)

- Employee Type
- Job Profile
- Job Title
- Business Title
- Time Type
- Location
- Scheduled Weekly Hours

Additional Job Classifications (Edit Position)

Required:

- Pay Basis Code
- Timesheet Code
- Overtime Code
- Holiday Code
- PERS Class Plan
- Service Type Code

Optional:

- Job Share
- Concurrent Job Number
- PERS Plan
- Underfill
- Internship

Other

- Comp - Grade Profile, Step, Salary (Request Comp Change)
- Probation Period

- Make sure the effective date of any correction you make is the same as the hire date
- If you get an error with an effective date you are trying to use, send in a help case
- **PLEASE** leave comments with details of what you updated any time you use Edit Position

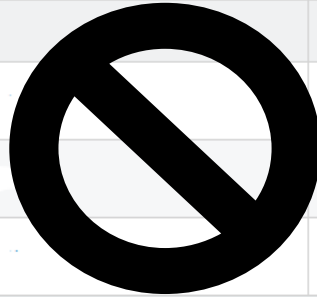
What to do after you have done it all



Correcting a Probation Period

Probation Periods History 3 items

Business Process	Effective Date	Initiated On
Manage Probation Period:	02/16/2022	02/04/2024 03:53:24 PM
Manage Probation Period:	02/16/2022	04/26/2022 02:01:34 PM
Manage Probation Period:	02/16/2022	02/14/2022 09:11:59 AM



Don't use Manage Probation Period

Use Business Process > Correct

A screenshot of a web-based HR system interface. The "View Worker History" section is active, showing tabs for Staffing, Organization, and Personal Data. Under the Staffing tab, there are sections for Hire History and Probation Periods History. In the Probation Periods History section, the "Manage Probation Period: Karen" entry is selected. A context menu is open over this entry, with the "Business Process" option highlighted in red. A sub-menu is also open, showing the "Correct" option highlighted in red. Other options in the sub-menu include Confirmation View, Full Process Record, Test Rule, View Definition, View Remaining Process, and View Security. The "Due Date" is 12/12/20 and the "Effective Date" is 12/11/20.

What to do after you have done it all



If you discover a mistake – Things you need to submit a Workday Help Case for assistance

- **Hire Date**
 - If we need to correct a hire date for you, do not adjust other service dates first. Once we correct the hire date, we will ask you to review service dates and adjust as needed.
 - Please remind hiring manager that if there is ANY change to a hire to notify HR immediately
- **Hire Reason**
- **Position** - If hired on wrong position, we will have to rescind the hire so you can hire on the correct position
- **Grade Profile** – AA to AP, etc. (if the hire date is not 1st of the month)
- **Union/Repr**
 - Don't try to remove an incorrect union by using an end date that is the same as the start date
 - Benefit code is directly linked to whatever Union is assigned

If you initiate one of these Business Processes and then remember its not something you can do, please cancel the action and then send in a case. We cannot finish those actions for you.

Worker Details HCM | Reports



- Worker Reports > Home Contact
- Worker Reports > Work Address
- Worker Reports > Workers without email addresses
- HCM | Date of Birth Change Report
- PAY | Social Security Number Change Report
- HCM | Home Address Changes by Date Range
- HCM | Working Remotely | Awaiting Action
- HCM | Working Remotely | Completed Requests
- HCM | Current Worker Detail Report

Hire Reports



- HCM | Employee Hires Report (New Hires Only)
- HCM | Employee Hires Report (including Transfers In from Other Agency)
- HCM | Direct Appointments
- HCM | Business Process Transactions of Type Awaiting Action (by Company or Supervisory Organization)

Questions?

The background features a light green and white color palette. On the right side, there are several overlapping, wavy, ribbon-like shapes that create a sense of depth and movement. These shapes are set against a background of fine, light green lines that form a subtle grid or pattern, similar to a topographic map or a technical drawing. The overall aesthetic is clean, modern, and professional.

Next up.....

Job Change

