

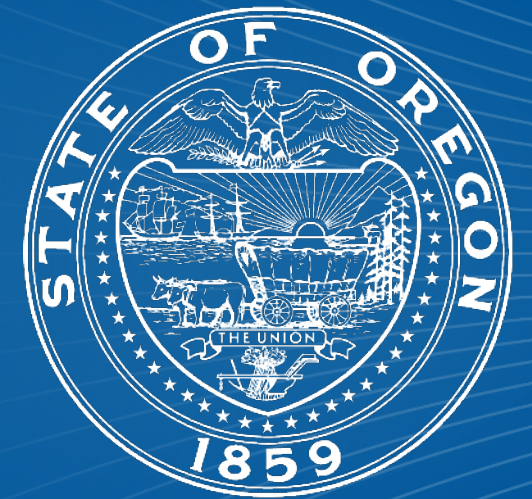
Department of Administrative Services



Workday Foundations

Agenda

1. Introduction
2. Series Overview
3. Additional jobs
4. Audits and Reporting
5. Close



Introductions



Data Integrity Team

- Ryan Englund
- Libbie Saunders

Workday Classification and Compensation Administrator and SME

Shilo Muller

Workday Foundations



Data Integrity Team Workday Foundations



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



Workday Foundations – Additional Jobs

Additional jobs are added for various reasons including developmental roles, work out of class, backfill for someone on leave, special projects, workers in the reclass process, additional paid jobs for part time employees, and official board member positions.

It is important to establish whether the position should be paid or unpaid, and reason for and duration of the work.

Workers with two or more jobs have special considerations for union representation, leave, and pay that should be monitored.

Prior to beginning an additional job – Work out of Class



- Requisition Details – Is worker attached?
- Check Position & Compensation Data (is it pending reclass? Percent or Amount?)
- Verify Start Date, verify end date
- Double check for any upcoming or needed comp changes (COLA, merit, allowances, etc.)
- Start add additional job

Additional job - Work out of class



Review Candidates REQ-143689 Facility Energy Technician 2 (Open)

Active Candidates 1 of 2 Active Referrals 0 of 0 Active Internal Candidates 0 of 1 Converted Prospects 0 of 1

All Active Candidates Awaiting Action Inactive Candidates Extend My Search

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 Review Screen Assessment Interview

No Filters Applied

1 item Overview

<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	Date Applied
<input type="checkbox"/>	Al Perfect (Internal) (CAND-411689)	Completion	Review	18	OR0287769	Permanent	No	0		02/29/2024

wd5-impl.workday.com/oregon/d/inst/15247/2475101928.html#TABIND

Home - EHR Tracker Imported From Edge Workday Production Workday Sandbox

Sandbox

Company: Department of Administrative Services

Worker: Al Perfect

Contact: Work Address 800 NE Oregon Street Portland, OR 97

Job: Facility Maintenance Specialist - SR18 - Non Exempt

Organization: Portland & Custodial - DAS

Business Title: Facility Maintenance Specialist - SR18 - Non Ex

Manager: Tina Stokes-Gehring

Location: Portland | DAS

Transfer, Promote or Change Job month(s), 8 day(s)

Change Business Title

Add Job

Launch Onboarding

Terminate Employee

Manage Probation Periods

Additional job - Work out of class



Add Job

Supervisory Organization * HVAC - DAS

Employee * AI Perfect

Add Job

AI Perfect HVAC - DAS

Effective Date * 02/15/2024

Reason * Add Additional Employee Job > Job Rotation > Workload Assistance

Job Details

Position * Facility Energy Technician 2

Job Requisition REQ-143689 Facility Energy Technician 2 (Open)

Employee Type * Temporary (Fixed Term)

Job Profile * Facility Energy Technician 2 - SR22 - Non Exempt

Time Type * Full time

Location * Salem | DAS | Maintenance Shop

Pay Rate Type * Salary

Working Time

Location Weekly Hours 40

Default Weekly Hours 40

Scheduled Weekly Hours 40

FTE 100%

Work Shift

Additional Details

Job Title Facility Energy Technician 2 - SR22 - Non E

Business Title Facility Energy Technician 2 - SR22 - Non E

Job Exempt



Additional job - Work out of class

- Rotation Reasons

- Add Additional Employee Job > Job Rotation >
- Add Additional Employee Job > Part-Time Employee >
- Add Additional Employee Job > Reclass >

- ← Add Additional Employee Job > Job Rotation
- Add Additional Employee Job > Job Rotation > Backfill for Person on Leave (Developmental)
- Add Additional Employee Job > Job Rotation > Backfill for Person on Leave (Workload Assistance)
- Add Additional Employee Job > Job Rotation > Mentoring Arrangement (Developmental)
- Add Additional Employee Job > Job Rotation > Mentoring Arrangement (Workload Assistance)
- Add Additional Employee Job > Job Rotation > Special Project (Developmental)
- Add Additional Employee Job > Job Rotation > Special Project (Workload Assistance)
- Add Additional Employee Job > Job Rotation > Workload Assistance



Additional job - Work out of class

Propose compensation hire for additional position

* Only the grade profile should be entered here, use 'X' to remove salary

A screenshot of a web form titled "Salary". The form contains three sections: "Assignment Details" with a value of "3,790.00 USD Monthly" and a red 'X' icon; "Plan Name" with a value of "Monthly Salary Pro Rated if Less than Full Time"; and "Effective Date" with a value of "09/06/2022". Below these sections are three "Add" buttons. At the bottom of the form are three buttons: "Submit" (highlighted with a red box), "Save for Later", and "Close".

All allowances should be added on base position


If union for additional job is the same as the base position, you don't need to add union segment for the additional job.

Additional job - Work out of class



PDF

AI Perfect

Facility Maintenance Specialist - SR18 - Non Exempt 

Facility Energy Technician 2 - SR22 - Non Exempt (+)

Additional job - Work out of class Pending Reclass



**Pending reclass assumes the reclass package has been submitted to DAS CHRO
Timing and execution of this process is based on your applicable CBA and policy.*

The worker will get a dollar amount (not a percentage) for the next step higher in the new range. This amount will change with COLA, Merit, etc. and will need to be reviewed when a worker has a compensation change.

This Work out of Class pending Reclass will stay active until the reclass has been approved by DAS, and finalized by your agency budget, then the additional job will end and the original position will be modified to match the approval.

Once approved follow the knowledge article “Reclass, Complete” to process the reclass.

- *Note: a job change should not be used in lieu of reclass. If a worker is being reclassified and needs to be moved to a different position, the reclass should be processed, then you can use a job change (ex. Lateral or position number change only) to move them to another position.*



Additional job - Allowance

If additional job is to represent duties of WOC/rotation and is not determined to be developmental, most policy/CBA say that allowance either needs to be 5% of base pay or a dollar amount equal to the first step of the higher duty salary range, whichever is greater.

- When adding an allowance to a worker an Expected or Actual End Date can be added.
 - An actual end date is the last date the allowance will be paid thru. The system will add a future dated automatic compensation action to end the allowance. An actual end date **MUST** be in the future (not retroactive) and must be on or after the expected end date.
 - An expected end date is just for reporting, it will not end the allowance.
- To manually end an allowance, including ending an allowance retroactively, you would use an effective date of the first day the allowance will not be paid (ex. if an allowance will be paid thru 3/31, the effective date you would use is 4/1). In the allowance section and click the “X” on the allowance you are removing.
- **If you are adjusting prior compensation and you get the error message you cannot use an end date in the past it’s likely the worker has an allowance with a past end date. You will have to remove the end date and manually delete the allowance in a separate compensation change. (even if your initial change has nothing to do with the allowance causing the issues)**

The knowledge article “Compensation Change, Request” covers several changes/updates that can be completed by this action – including adding, updating and ending allowances.

Additional job - Additional Paid job



Shelia Alright
Payroll Analyst - SR21 - Non Exempt

Actions

Team

- Summary
- Overview
- Personal
- Contact
- Compensation
- Pay
- Job
- Absence
- Performance
- Feedback
- Career
- Benefits

Company
Department of Administrative Services

Manager
Kari Bevier

Job Details

Employee ID: OR0287770
Supervisory Organization: The People of Oregon >> Payroll Services - DAS
Position: Payroll Analyst - SR21 - Non Exempt
Business Title: Payroll Analyst - SR21 - Non Exempt
Job Profile: Payroll Analyst - SR21 - Non Exempt
Job Family: > Payroll Analyst
Employee Type: Permanent
Management Level: Non-Management
Time Type: Part time
FTE: 50.00%

Location: Salem | DAS | Executive Building
Hire Date: 01/15/2024
Original Hire Date: 01/15/2024
Continuous Service Date: 01/15/2024
Probation End Date: 07/14/2024
Length of Service: 0 year(s), 1 month(s), 14 day(s)
Time in Position: 0 year(s), 1 month(s), 14 day(s)
Time in Job Profile: 0 year(s), 1 month(s), 14 day(s)

Contact Information - Public

Work Address
155 Cottage St NE Salem, OR 97301 United States of America

Feedback

Give Feedback

Shelia Alright Statewide Accounting and Reporting - DAS

Effective Date * 02/01/2024

Reason * Add Additional Employee Job > Part-Time Employee > Part-Time Employee

Job Details

Position * Senior Accounting Analyst (Accountant 3)

Job Requisition REQ-146965 Senior Accounting Analyst (Accountant 3) (Open)

Employee Type * Permanent

Job Profile * Accountant 3 - SR30 - Exempt

Time Type * Part time

Location * Salem | DAS | Executive Building

Pay Rate Type * Salary

Working Time

Location Weekly Hours 40

Default Weekly Hours 40

Scheduled Weekly Hours 20

FTE 50%

Work Shift

Additional Details

Job Title Accountant 3 - SR30 - Exempt

Business Title Accountant 3 - SR30 - Exempt

Job Exempt

Additional job - Additional Paid job



Shelia Alright
Accountant 3 - SR30 - Exempt (+)

Actions

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Compensation Estimated Annual Compensation Pay Change History

Totals 1 item

Total Salary & Allowances	Total Base Pay	Currency	Frequency
3,295.00	3,295.00	USD	Monthly

Compensation

Compensation Package: General Compensation Package

Grade: 30

Grade Profile: MMN-30-AA

Step: Step 09 - 7,803.00 USD

Total Base Pay Range: 6,257.00 - 9,226.00 USD Monthly

Company: Department of Administrative Services

Plan Assignments 1 item

Effective Date	Plan Type	Compensation Plan	Assignment
02/01/2024	Salary	Monthly Salary Pro Rated if Less than Full Time	6,590.00 USD Monthly (Prorated: 3,295.00)

Additional job - Official Board and Commission Members



If board member established, then the 'new' position will be added as an additional job and then switched to primary.

If you are ending a job, check with the Board and Commission Admin to see if the individual will remain active on the board.

Please do not move or alter board positions without submitting a case to the Board Admin (Sheri Nees).



Additional job - Ending the Additional Job

Effective date used would be the last day worked in the additional job.

If a worker is ending both the primary and additional job on the same effective date, complete the actions for the ending of the additional job first, then processes the primary job ending.

If ending an additional job retroactively, the No Retro Processing Prior to Date will change/update due to ending the additional job in a month in which payroll has already closed.

Knowledge articles:

- Additional Job (Rotation/WOC), remove
- No Retro Processing Prior to Date (NRPPTD)



Additional job - Primary Job Swap

- When the additional job becomes primary and the primary job ends
- This process will create a no retro prior to date, so retro pay changes will not be picked up.
- If a worker has pay results we will have to wait until the 1st of the following pay period to complete the job swap.
- Off season workers are best job changed, not to retain the off season as an additional.

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 additional job start 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

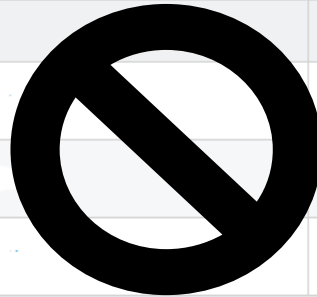
What to do after you have done it all



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 top navigation bar includes "View Worker History", "Staffing", "Organization", and "Personal Data". The "Staffing" tab is active. Below the navigation, there are sections for "Hire History 1 item" and "Probation Periods History 1 item". In the "Hire History" section, a "Business Process" entry is highlighted. A context menu is open over this entry, showing options: "Business Process", "Favorite", and "Event". The "Event" sub-menu is expanded, showing options: "Confirmation View", "Correct", "Full Process Record", "Test Rule", "View Definition", "View Remaining Process", and "View Security". The "Correct" option is highlighted with a red box. Below the "Event" menu, 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

- **Additional Job start date**
- **Additional Job Reason**
- **Position** - If additional job is put in the wrong position, we will have to rescind the additional job so you can put the employee to the correct position

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.

Reports for Audit



Allowance Reports

HCM | Worker Allowances Report

HCM | Reclass Events with Change Details

CMP | Compensation Changes for Workers with Amount Allowance Plan

Additional Job Reports

Multiple Job Workers | All Workers

Questions?

Next up.....

Compensation changes

