Workday Wednesday: Advanced Manager Functions
Agenda

● Job Changes (Terminations, Transfers and Change Job Details)
● Approving and Correcting Absence
Job Changes

WHAT ARE SOME JOB CHANGES IN WORKDAY AND WHEN WILL I USE IT?

1. Termination: to end an employee's primary job or position within an organization.
2. Transfer: to move an employee in your organization to a new manager.
3. Change Job: to update the employees job details (i.e. scheduled hours, location, etc.)

WHO CAN INITIATE THESE?
The Manager and Management Chain (i.e. managers manager up to the VP level) can initiate job changes.
Workflow Process for Terminate Employee

1. Manager: Initiate Termination/Upload Letter of Resignation in WD
2. HR Business Partner: Review/Approve Employee Termination
3. IT: Edit Employees Security
   
Completed
WHO CAN I TERMINATE? Any position that is in your organization (including Students)

1. Access the Terminate Employee Task
2. Complete the Reason section by selecting a primary reason for this termination
3. Complete the Details section:

<table>
<thead>
<tr>
<th>Table Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Termination Date</td>
<td>Enter the date the employee notified you of their resignation or the date you notified the employee of their termination. Automatically populates when the employee's resignation initiates the termination.</td>
</tr>
<tr>
<td>Last Day of Work</td>
<td>Automatically populates from the termination date.</td>
</tr>
<tr>
<td>Pay Through Date</td>
<td>Change this date to at least two weeks out or to next pay day.</td>
</tr>
<tr>
<td>Resignation Date</td>
<td>Automatically populates when the employee's resignation initiates the termination.</td>
</tr>
</tbody>
</table>

4. Use the Regrettable section to specify whether the termination is a loss to the organization, regardless of the reason.
5. Use the Eligibility section to indicate whether the employee is available for rehire.
6. Complete the Position Details section:

<table>
<thead>
<tr>
<th>Table Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close Position</td>
<td>Select this check box to close the position in the employee's former organization. Please note that you will want to keep the position open if you plan on rehiring.</td>
</tr>
<tr>
<td>Is this position available for overlap?</td>
<td>Specify whether another worker can fill the position before the employee departs.</td>
</tr>
</tbody>
</table>

7. Add the letter of resignation or other supporting documents in the Attachments section.
Workflow Process for Transfer

1. Current Manager: Initiate Transfer
2. Receiving Manager: Review/Approve the Transfer
3. HR Business Partner: Approval
4. Payroll: Approval
5. Transfer Completed
WHY YOU WOULD DO THIS? To transfer a worker to a new manager. Before doing so, please verify that the new manager's organization exists. If not, please contact the HR Department.

CURRENT MANAGER WILL:
1. Access the Change Job task and select a Worker.
2. In the Start section, select the date, reason (transfer > move to new manager), the manager, supervisory organization, and location. This change should always happen at the beginning of the next pay period.
3. Under the section labeled Move, specify whether you plan to backfill, move, or close the headcount.
4. Attach any supporting Documents to justify the manager change.
5. Review the overall changes and hit Submit.
3 Workflow Process for Change Job

- Current Manager: Initiate Change Job
- HR Business Partner: Approval
- Compensation Partner: Approval
- Payroll: Approval
- Change Job: Completed
WHY YOU WOULD DO THIS? To update an employee's job details (i.e. scheduled hours, location, etc.)

1. Access the Change Job task and select a Worker.
2. In the Start section, select the date, reason (select data Data Changes > select one of the three reasons). The manager, supervisory organization, and location.
3. Confirm/Update the sections labeled Job, Location, and Details accordingly.
4. Attach any supporting Documents to justify the update/change.
5. Confirm the employees Organizations (i.e. Cost Center) and Compensation.
6. Review the overall changes and hit Submit.
4 Workflow Process for Approving and Correcting Absence

- Employee: Initiate Absence Request
- Manager: Approval
- Absence Partner: Approval (if necessary)
- Change Job: Completed
Approving Absence

1. Go to your Inbox
2. Click on the Absence request
3. Click Approve (if it is not approved, click The three dots, next to approve for other Options, send back (if want additional information), Deny, or cancel request)
4. The approved time will show on the calendar as green
Correcting Absence

1. Go to the Team Time Worklet
2. Under Actions Select Enter Worker Time
3. Select the employee you want to correct
4. Click on the calendar absence to correct
5. edit the absence