

## WORKDAY FAQs for AGRILIFE

### Additional Jobs

- **How do we see/access the total number of jobs an employee has in within TAMUS?**
  - You can see all jobs for an employee from the employee Worker Profile > Overview and then access the All Jobs - TAMUS tabs. Additionally, you can see that an employee has more than just a Primary Job from the reversed arrows symbol next to their name in Worker Profile. You can then see the list of jobs by clicking on the reversed arrows symbol.
- **If someone's primary job is with my department, but he also holds an additional job elsewhere, how can I terminate the primary job and leave the additional job alone? Workday gives you an error that you cannot terminate the employee because he holds additional jobs.**
  - Switch primary job to change the additional job to the primary job. You can then terminate the additional job (which was originally the primary job.) The unit who is terminating the position is responsible for taking this action.
- **Add Additional Job vs. Request One-time Payment**
  - If it is going to be an on-going job that will last for several months, use Add Additional Job BP. Or if it is going to be a job they do every year at this specific time, then use Add Additional Job so that every year at that time, they are eligible to put time in for it. (ex: hired for lambing season only, 4-H camp counselors in summer). If it is a one time-activity, use Request One-time Payment BP after obtaining approval via the AG-519.

### Background Check

- **How will the Background Check process work?**
  - If you are using Sterling for background checks, when a candidate is moved to the Background Check step of the Job Application process an inbox task will trigger to the Recruiting Partner who will trigger the integration with Sterling Talent Solutions. Upon receipt of the data, Sterling will email the candidate, the candidate will provide their information to Sterling and Sterling will run the background check. When the background check process is complete, the Recruiting Partner will receive an inbox task informing them the background check results are Ready for Review. The Recruiting Partner will update the Status on the background check step in their inbox. After this, the Recruiting Partner will receive in inbox task for the Background Check Decision, where they will decide whether to advance or decline the candidate.
- **For positions not hired in Workday (student workers, graduate assistants, temp/casual), when or how is the background check handled?**
  - Units will continue to submit background check requests and degree verifications as they currently do (via LF/WIP-HR folder or email to [HRBackground@ag.tamu.edu](mailto:HRBackground@ag.tamu.edu)). The HR Contact/Recruiting Coordinator (whomever initiated) will receive another To Do step to record the background check and selective service verifications using Edit Other ID business process (HR Partner receives To Do if they or manager initiated). After receiving the background check completion certificate the HR Contact enters Completed or Done in the Comment box and Submits the To Do step.

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### Business Processes

- **If we begin a business process (for instance, terminating an employee) and submit it for approval – then realize it was a mistake – how do we stop the process from going forward? Is there a method for “recalling” the process? Or canceling it?**
  - Click the gear icon in the upper corner and select “cancel” if that options exists. Or, the person who is next in the approval process can send back or deny. Deny cancels the process entirely.
  - Not all BPs can be cancelled once submitted without action by an administrator at the System level.
- **Who should initiate Business Process?**
  - Many BPs can be initiated by multiple security roles including Manager. The primary initiator should continue to be the unit contact (HR Contact, Recruiting Coordinator, Absence Partner, Timekeeper, Talent Analyst).

### Creating Positions

- **The following titles have more than one pay grade. How do we know which AgriLife is using?**
  - The “P#” to the right of the following titles tells you the pay grade. AgriLife will use the following job profiles/titles:
    - Associate Director P14
    - Agency Program Manager P16
    - Program Assistant P7
    - Program Coordinator I P9
    - Program Coordinator II P11
    - Program Manager P12
    - Program Director P15
    - Project Director P16
    - Supervisor, Accounting P11
    - Manager P11

### Degree Verifications

- **Is there another way to handle the degree verification completely outside Workday even if using Workday recruiting?**
  - Yes. While the background check being processed, provide degree verification form (attached) to candidate.
  - Answer “NO” to question “Is education and/or certification/licensure required?” on Hiring Compliance Checklist so that the degree verification is not sent to the candidate via Workday.

### Delegations

- **If a manager or department head delegated leave approval to someone else, can that person approve their own leave? If not, who would the leave approval be done by, the alternate delegate? And how is the alternate delegate notified to do this?**
  - Business processes delegated to another person will not trigger to the delegate if the delegate is the subject of the business process; rather the step will trigger to the alternate delegate which defaults to the delegator's manager. Delegators are encouraged to have conversations with their manager and the persons they intend to delegate business processes to clarify expectations and the delegated work.
- **Can a manager delegate timesheet approval to someone in their supervisory org? For example, can a PI delegate to a Grad Assistant to approve student worker timesheets?**
  - Yes.

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- **Will whoever the time sheet approval is delegated to see everyone in that same supervisor org?**
  - Yes.
- **Can a manager delegate timesheet approval to the timekeeper?**
  - It is not necessary for a manager to delegate timesheet approval. A timekeeper has access to approve timesheets.

### Hiring

- **Default Weekly Hours** should ALWAYS be 40.
- **Scheduled weekly hours** is the hours expected to be worked. FTE percentage will be calculated by Workday (Scheduled hours / Default Weekly Hours). Hourly paid employees will be paid for hours worked, even if greater than the number of scheduled weekly hours.
- **Graduate Assistants:** Scheduled Weekly Hours should be 20 (50% effort). The salary entered should be the FTE amount (what the employee would make if they worked 100% effort.)
- **Non-benefit eligible positions (less than 4 ½ months or less than 50%):** When creating the position, use Worker Sub-Type “Temporary/Casual Staff (Fixed Term)”. When hiring, if the term is 4 ½ months or more, enter 19.6 or less as the Scheduled Weekly Hours so the FTE percentage is calculated at less than 50% effort.

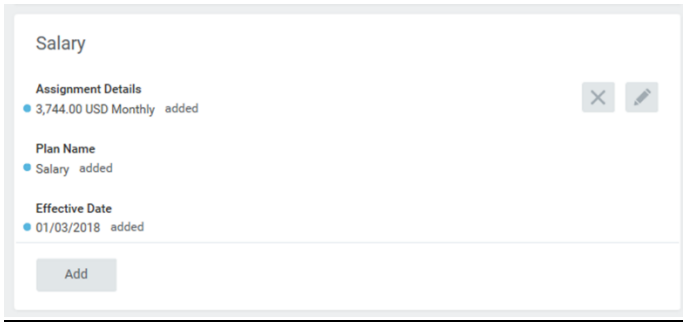
### Inbox Management

- **When you click on "save for later" - how can others access the action to keep moving in process if the person who saved for later is absent and unable to delegate from their inbox to someone?**
  - If one person uses Save for Later, that person then has the item and it is no longer available for other people in the same role. Any security role with access to the history of the business process can see the status "Saved for Later" and the person who saved it. If that person can no longer perform the remaining duties for some reason, a Business Process Administrator can reassign the step to another person in the business process security group for that step. Users will be able to email [workdaysupport@tamus.edu](mailto:workdaysupport@tamus.edu) to reassign the task to another person in the security group for that step.

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### Job Requisitions

- **How can I post a job requisition showing the salary as “commensurate”?**
  - To have the job requisition/posting read as commensurate, the salary needs to be deleted and not blanked out on the job requisition. You would need to click the X box next to the pencil icon on the compensation tab of the job requisition. If it is a salaried position (shown below) you would click the X in the Salary section, and if it is an hourly paid position you would click the X box in the Hourly section. This will remove the compensation from the requisition, and Workday is configured to post the word "commensurate" on the posting once the job requisition is posted on the internal and/or external career site. Note: you will not see the word "commensurate" on the job requisition, only on the job posting once the requisition is posted.



The screenshot shows a 'Salary' section in a job requisition. It includes three rows of data, each with a blue dot and the word 'added' to its right. The first row is 'Assignment Details' with the value '3,744.00 USD Monthly'. The second row is 'Plan Name' with the value 'Salary'. The third row is 'Effective Date' with the value '01/03/2018'. To the right of the first row are two icons: a grey 'X' in a square and a grey pencil icon. At the bottom of the section is a grey 'Add' button.

### Longevity Pay for Faculty

- **How do I change the longevity flag for a faculty member who should earn longevity when they are not paid on teaching funds?**
  - Faculty job profiles default to no longevity pay. If a faculty member is not teaching and is eligible for longevity pay, the HR Contact must override the job profile classification to “Y - Yes (Longevity Eligible)” by doing a Job Change [Job Change => Data Change => Additional Job Classifications]. When a faculty member’s funding changes to teaching funds, making them ineligible for longevity, the HR Contact must change the job profile classifications back to “N - No (Longevity Eligible)” or remove it altogether so the job profile default classification of no longevity will be in effect.

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### Payroll/ Funding

- **When do funds encumber?**
  - Overnight once the process COMPLETES. Not while still in routing.
- **If you use a previous date on a cost allocation, does that generate a “payroll correction,” or give you a notice that a payroll correction should be done?**
  - No, using a back date on your cost allocation doesn’t affect any previous pay periods. If you do need to correct prior pay cycles, you’ll do a payroll cost transfer.
- **What must occur for a vacant position not to encumber funds?**
  - When an employee terminates from a position or additional job the funds encumbered will be released once that BP is complete during the overnight process.
  - When an employee is hired into their position and the costing allocation process for the worker position has completed the funds will be encumbered during the overnight process.
- **What happens if there is no costing allocation or account is closed/invalid/frozen? Or if funding stops will they still get paid and from what account?**
  - They will get paid even if there is not funding. The employee will be paid from an agency “default” account. The unit will then be responsible for correcting via the payroll cost transfer (PCT) process.
- **When are changes, such as costing allocations, due to make payroll?**
  - Any BP to make a change to payroll must be complete before the payroll runs
- **How does someone in the Business Office change his or her own funding account?**
  - A different employee with the appropriate role must do it.
- **After completing a cost allocation change, how do I know how the encumbrances on my accounts are affected?**
  - Net Pay calculator that is outside of Workday (in Canopy) that will tell us how much will be encumbered or released from an account after a cost allocation change. This represents an extra step the business office staff will need to do to prevent overspending an account or leaving too much money at the end of a contract.
- **How can I find out if overtime is banked or paid?**
  - Timekeepers and Payroll Partners can run the Time Tracking Details report to quickly review what the Comp Time Banked ID is set to for their employees. It’s best to read the ID name as a question: Comp Time Banked? N or NO will pay overtime. Any other value (Y, Yes or blank) will bank any overtime as comp time. To edit overtime, pay, use the Edit Other ID job aid.

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### Positions

- **Why doesn't the "create position" business process include a mechanism for showing the funding accounts?**
  - The assign costing allocation BP is triggered during the create position BP and that's the point at which funding accounts are assigned to the position.
- **What are position restrictions?**
  - Position overview, restrictions for hiring into the position, qualifications needed for the position, incumbent history, and default compensation. Position Restrictions are the hiring restrictions, qualifications, education, experience and skills required to perform the functions of the job.
- **What are the potential ramifications of leaving a position open and unfilled, versus closing it?**
  - Currently there is no requirement to close a position and there are no known ramifications to leaving the position vacant.

### Reports

- **Which reports (if any) are the business office staff required to run, and when?**
  - The list of commonly-used reports is now available on the Workday Help link from SSO. Users should refer to that list, specific to their security roles, to help them perform their duties in Workday.
- **Which reports will be useful to me in carrying out my job duties?**
  - <https://it.tamus.edu/workday/get-started/crosswalks-to-workday/commonly-used-reports-crosswalk/>

### Security Roles

- **Where can an employee see what security roles they have been assigned? If the employee is an HR contact or Manager, where can they look to see what security roles employees in their supervisory orgs have been assigned?**
  - An HR Contact can view the role assignments for any employee they are an HR Contact for. A Manager can only look at the role assignments by looking at the role assignments on the supervisory organization. HR Contacts can use "assign role" option and then see roles.

### Student Worker

- **If we have a student worker employed in one job, supervised by one manager, but working on multiple projects: right now, we simply add all needed source lines on the EPA and the employee emails when payroll is due so that we may allocate their hours across the accounts (i.e. this pay period they worked 2 hours on project X, 6 hours on project Y, and 10 hours on project Z). Going forward, is it true that each of those funding sources must be its own separate job?**
  - There is not a way to allocate hours worked on one job to separate funding so they way to do that would be to set up separate positions.
  - Each funding source must be its own separate job. If the employee is working three different jobs, particularly if there are different Managers, our best practice guideline is to have the employee be employed in three different positions using Add Additional Job. If your System Member has already talked with Amy Suter, Time and Absence Lead, to use Project time reporting, please refer to those arrangements and view the job aids that will be available on the Workday Help link from SSO.

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### Supervisory Organizations, Moving Employees

- **How do I make an employee a supervisor?**
  - When an active employee will begin supervising others for the first time or a new employee being hired into a newly created position will be a supervisor, a new supervisory organization must be created so the employee can have the manager role assigned to them. Please send your requests to your HR Generalist and include the employee's name, UIN number, and the first date they will be supervising others. This is a multi-step process in Workday, so please allow sufficient time for the business process to complete. You will be notified when the new supervisory organization is ready.
- **How do I move employees from one supervisor to another WITHIN the same company (A to A, X to X)?**
  - HR Contacts can initiate a change in the reporting structure within an organization. For example, XYZ Employee reports to ABC Admin currently in Workday but 123 Manager is her actual supervisor. The HR Contact can move XYZ Employee to 123 Manager's supervisory organization by following the steps detailed within the Move Workers (Supervisory) job aid. This should only be used when there is no other change to the job except that it is moving from one supervisor to another.
- **When should I use Move Workers and when should I use the Change Job BP?**
  - Use Move Workers when moving an employee to a different supervisory organization, and therefore manager, if no other changes are needed to the job or employment agreement at the same time. Reminder that Move Workers should not be used to move an employee to a different Company, i.e. workstation or System Member Part.
  - Use Change Job for any moves or transfers between company and System Member Part. Use Change Job if the job or employment agreement is being changed and the employee moved to a new supervisory organization at the same time. If you are using Change Job to move a worker, the step to Assign Roles will trigger so you can choose whether the roles will move with that worker. In Move Workers, that step does NOT trigger, so the roles travel with the person even if the roles no longer apply.
  - If the manager of a supervisory organization needs to change and that's it, simply use Assign Roles and assign the Manager Role to another individual.

### Terminations

- **Who should initiate a termination in Workday?**
  - HR Contacts in Workday should initiate the termination process, instead of the Manager, for any employees including student workers. If the employee's Manager initiates the termination, the off-boarding tasks that are triggered in Workday will route to HR Partners, rather than to the unit HR contact. Such off-boarding tasks include collecting keys, terminating network access and other steps that are usually completed in the unit. Be sure to follow your usual off-boarding unit checklists and please remind Managers, even those who supervise student workers, that the HR Contact in the unit should be the one initiating the termination process.
- **What date is used as the termination date**
  - When you start a separation (termination) business process in Workday, you must enter the employee's termination date differently than our prior EPA process. With the prior EPA process, you entered the day after the employees last day worked as their termination date. In Workday, the Termination Date and Pay Through Date fields should be the actual termination / retirement date. The Last Day of Work may be the same or different.



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- Example: A unit enters 1/1/2018 for both the Termination Date and Pay Through Date fields and 12/31/2017 as the Last Day of Work. The separating employee would be paid for 1/1/2018 along with benefits for the month of January. If the true termination date was 12/31/2017, this date should be used in all three fields thus the final pay check would reflect pay through 12/31/2017 not 1/1/2018.

- **How do I extend employment?**

- To extend the term of employment for a position, use the Change Job business process (BP) to do a Data Change and enter a new Annual Work Period/Term. This BP will also trigger the costing allocation BP at which time the dates can be extended for the funding sources as well.

### Time Off/Leave

- **How do vacation accruals work with faculty?**

- If an employee is faculty and less than 12 months, vacation will not accrue at all. If an employee is faculty and is in a 12-month annual work period, vacation will accrue. If an employee is in an 11-month annual work period, time off will accrue for the 11 months in that period. No time off (sick or vacation) will accrue for the month not in their work period.

- **How do you handle a 9-month faculty who needs to be extended into the summer?**

- Use Add Additional Job for the summer term. Changing the term (Annual Work Period) to a shorter time on the primary position causes some problems for benefits.

- **What does the Time Off Service Date control?**

- The time off service date controls when employees can begin using Vacation. It should trigger and be set for all employees. While some employees are not eligible for time off in the position they are currently being hired for, if they later change positions to one that is eligible for time off, they will not be able to take vacation if the time off service date is missing.

- **How will sick leave pool hours be handled?**

- Sick leave pool hours will be handled by the same way as they currently are. The department will submit the AG-434, along with the supported documentation from the physician to HR. HR will review the medical documentation and the sick leave pool request. Once approved, HR will add the appropriate number of sick leave pool hours needed to the employee's leave balance in Workday. The sick leave pool hours will appear and be available for use once their other paid leave balances are exhausted.

- **Will Workday know to suspend accruals when a Leave of Absence is approved, and restart them automatically when a Return from Leave of Absence is approved?**

- Once an employee's leave of absence (unpaid leave for more than 30 days) for an entire given month is approved, the accruals for that month, will automatically be suspended in Workday. When the employee's request to return from the Leave of Absence is approved, the accruals for the month that they return to work in, will be added automatically.



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- **When an employee is out on extended paid leave, the accruals will not automatically be suspended.**
  - If an employee is on a paid time off, you can either use the 'Maintain accrual and time off adjustments/overrides' or 'Using Accrual Overrides' to change the accruals to 0 so the employee cannot access the time. You could then re-issue the time to them upon their return.

### **Option 1:**

Using Accrual Adjustments (assuming 8 hrs. sick & 10 hrs. vacation per month)

Sick accrual = -8 hours 12/01/17

Vacation accrual = -10 hours 12/01/17

Sick accrual = -8 hours 1/01/18

Vacation accrual = -10 hours 1/01/18

On 1/3/18 when the EE returns to work

Sick accrual +16 hours 1/01/18

Vacation accrual +20 hours 1/01/18

You must choose the January period in order for the employee to use it during any part of January. This also means they would have access to use it retroactively for 1/1-1/2 even though policy does not allow it so you would still have to monitor the use.

### **Option 2:**

Using Accrual Overrides

Sick Accrual override = 0 12/1/17-1/1/18

Vacation accrual = 0 12/1/17-1/1/18

On 1/3/18 when the EE returns to work

Sick Accrual override = +16 for period 1/1/18

Vacation accrual = +20 for period 1/1/18

You must choose the January period in order for them to use it during any part of January. This also means they would have access to use it retroactively for 1/1-1/2 even though policy does not allow it, so you would still have to monitor the use.

- **If the timekeeper is not a biweekly employee, they don't have the time worklet so how will they approve timesheets?**
  - They can see timesheets through the Review Time Report. This report is not recommended for those who manage large groups of people. Workday offers additional reports for Timekeepers.
- **Time Off Approvals for Employees with more than one position:**
  - Currently, Workday does not currently have functionality to allow us to restrict time off approval steps to only the primary manager. For employees who have multiple positions, the request will send to all managers. Only the manager of the "leave eligible" position should approve them.
  - If the manager of the non-leave eligible position approves the time off before the appropriate manager does, it will be removed from their inbox. Managers can still view their employee's time off request through the employee's profile and can correct or delete the time off if it is not approved or to have the employee resubmit to get the correct manager's approval on the record.
  - *Employees should contact their manager for their non-accruing position and ask them to disregard the 'to do' task of approving the request.*

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- **How will Absence Partners and/or HR Contacts know if someone requests FMLA time off or time off that may qualify as FMLA since the leave requests are now routed only to managers for approval?**
  - HR Contacts and Absence Partners will need to run the View All Worker Time Off report to see who has requested time off and/or FMLA and then follow FMLA procedures for notification.

### Timesheets

- **How can a timekeeper approve timesheets for a manager?**
  - Search for Mass Advance Business Process
  - Business Process Type – Time Tracking – enter time
  - Select the biweekly time-period you are working with
  - Do not select anything for worker
  - Initiated Date Range – The *From* moment date should be the beginning of the prior pay period. The *To* moment date should be the day the report is being processed.
  - Do not check include subprocesses or completed events.
  - Click ok