

WORKDAY FAQs for AGRILIFE

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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.

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 SterlingTalent 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 an 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). 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.

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).

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 in order 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.
- **Will whoever the time sheet approval is delegated to see everyone in that same supervisor org?**

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- 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.

I-9 s

How will the I-9 process work?

- The I-9 will be kicked off during the onboarding process. Employee can fill in section 1 and then it routes to the I-9 Processor to complete section 2 when they physically view the employee's documents. Once section 2 is signed and complete, it will route to the HR partner to review and submit to E-verify. A job aid and an online tutorial are both available from the Workday Help link on SSO for I-9 processing.
- Please make sure to review section 1 before signing section 2 to ensure it is completed correctly. A social security number is required for E-verify. If the employee is a U.S. citizen, please send it back and have the employee enter the SSN. If the employee is a foreign national without a SSN at this time, submit and corrections will be made when they obtain a SSN.
- I-9s will now be required any time an employee moves from one company to another, including within AgriLife. This is a change from our practice of allowing movement between AgriLife agencies without initiating a new I-9.

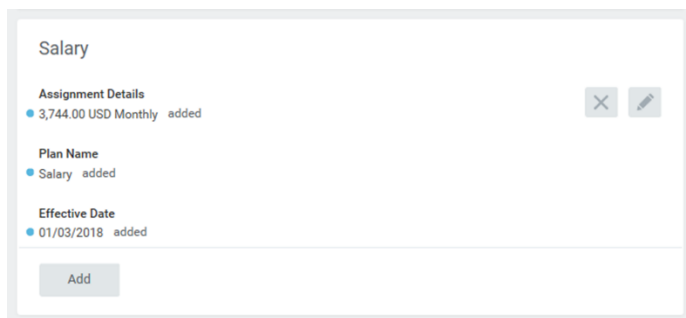
Job Requisitions

- **Can an AgriLife position requisition that is in an 02-supervisory org be posted on both the AgriLife and the TAMU career sites? If so, and the applicant applies to it on the TAMU career site, will they be rejected or get some sort of message if they then try to apply for the same job on the AgriLife career site? Are there any other downstream impacts that we need to know about?**

- Yes, it is possible to post an AgriLife position on the AgriLife and TAMU external career sites. Since the job requisition is tied to the position, the candidate can only apply once to the position - whether they apply via TAMU or AgriLife. However, if they create a separate candidate account in Workday, for example two accounts with different emails, then in theory they could apply twice with separate accounts (which is similar to today). Any notifications the candidate receives will be based on the requisition information which, in this scenario, would be AgriLife related. Based on this scenario, no there are no downstream impacts.

- **How can I post a job requisition showing the salary as "commensurate"?**

- In order 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 box 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 Workday interface. It contains three fields, each with a blue dot icon, a text value, and the word 'added' in a light blue font. The first field is 'Assignment Details' with the value '3,744.00 USD Monthly'. The second field is 'Plan Name' with the value 'Salary'. The third field is 'Effective Date' with the value '01/03/2018'. To the right of the first two fields are two small icons: a grey 'X' and a grey pencil. At the bottom of the section is a grey 'Add' button.

Time Off

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 be sent to all managers. Only the manager of the "time off (aka leave) eligible" position should approve. If the manager of the non-time off eligible position approves the time off before the appropriate

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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. We have requested new functionality from Workday on this known gap and will communicate future changes as they are made.

- **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.

Supervisory Organizations, Moving Employees

- **How do I make an employee 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 have the ability to 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 available in Workday Help <https://it.tamus.edu/workday/> on the SSO menu.

- **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 or not 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.

Payroll

With the implementation of Workday, the Budget Verification Document (BVD) no longer exists. Instead, HR Contacts may review the report called "Pay Calculation Results for a Period" which includes similar information to what was previously provided in the BVD, but not identical information. It is recommended that units run this report before and after payroll calculates to ensure that all the employees in their respective units are paid correctly.

Steps to run this report:

1. Click in the Search Bar on the top left of the Workday screen and type, Pay Calculation Results for a Period
2. Select the period (i.e. as noted below)
3. Next, enter the Supervisory Organization (i.e. 02120045 Payroll Services (Danny Grimes)) and check the box Include Subordinate Organizations

- **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.

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- **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.

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 to reassign the task to another person in the security group for that step.

Position

- **Why doesn't the "create position" business process includes 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?**
 - At this time there is no requirement to close a position and there are no known ramifications to leaving the position vacant.

Sick Leave Pool

- 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.

Time Off/Leave

- **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.
- **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.

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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:**
 - At this time, 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.*
- **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.

Payroll/ Funding

- **How do we know if someone is going to get paid or not on monthly payroll?**
 - There will be a report HR contacts will review when the monthly process comes about. Report name is Payroll Calculations Results Report for a period. This includes the same elements identified in the old Monthly Payroll (BVD) detail reports.
- **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?**

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- 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 has to occur in order 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 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. And as in today's world, the payroll dates will be established in advance.
- **How does someone in the Business Office change his or her own funding account?**
 - A different employee with the appropriate role has to 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 in order to prevent overspending an account, or leaving too much money at the end of a contract.

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. Workday will continue to provide awareness and best practices, including best reports to run prior to payroll, or end of the month, etc. Be watching for more information to come.
- **Will there be a Net Funding Spreadsheet that includes benefits, longevity percentages and who will send that and when, or is it a report and if so, what is name of report?**
 - Net funding Calculator available in January.
- **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/>
- **Do I have to turn in a BVD for monthly payroll?**
 - There is a report in Workday called Payroll Calculations Results Report for a period that mimics the BVD that you will be able to run to verify monthly employees, but there will be no requirement to submit anything to payroll.

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?**

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- 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 back to those arrangements and view the job aids that will be available on the Workday Help link from SSO.
- **How do you create a position under someone who is not currently a manager?**
 - Submit a request to make the person a manager (Move to New Manager) first and then create position in their supervisory org.

Timesheets

- **How can a timekeeper approve timesheets for a manager?**
 - Search for Mass Advance Business Process
 - Business Process Type – TimeTracking – 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

Transfer

- **When processing a transfer from a different district with change job, we aren't getting the ability to select the position. Could this have something to do with the fact that the adloc is also changing? Is there a different step rather than change job when moving from one district to another (two different adlocs?)**
 - Change Job behaves differently depending if the incoming or the outgoing support roles for the supervisory organization starts the process. The position itself is selected by the incoming (think of it as the 'hiring' organization). So, in the example screen shot, the next step triggered to the manager would have the position selection opportunity. Remember that a position must exist in the target supervisory organization to be able to transfer an employee, unless you are moving the position and headcount with the employee to the target supervisory organization.

Overtime

- 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.

Terminations

- **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.
 - 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.

Avoiding Duplicate Pre-Hire Records:

When Workday recruiting is not used, a pre-hire record must exist before an individual can be hired into a position. It is critical that pre-hire records NOT be created for individuals who already exist in Workday. To avoid creating a duplicate pre-hire record, please do the following:

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1. Change Search Preferences to “All of Workday” by selecting “My Account” and then entering “All of Workday” as the Preferred Search Category.

The screenshot shows the Workday user interface. On the left is a sidebar with links: Home, Inbox, Notifications, Favorites, W:Drive, Help, and My Account. The 'My Account' link is highlighted with a blue arrow. The main content area is titled 'Global Preferences' and contains settings for Default Locale, Preferred Locale, Default Display Language, Preferred Display Language, Default Timezone, Default Currency, and Preferred Currency. Below this is the 'Search Preferences' section, where the 'Preferred Search Category' is set to 'All of Workday', highlighted with a blue arrow.

2. Use the search feature and type in the employees UIN and hit enter.
 1. Does the UIN bring up any results?
 - Yes - the employee already exists in the system. Do not create a new record or pre-hire.

move on to Hire BP and choose "use existing pre-hire"

type in the employees name and choose the correct pre-hire record.

- No- Move on to search for name.

3. Use the search feature and type in the employees name and hit enter.
 1. Does the employees name appear?
 - Yes - the employee already exists in the system. Do not create a new record or pre-hire.
 - move on to Hire BP and choose "use existing pre-hire"
 - type in the employees name and choose the correct pre-hire record.
 - No - Employee is brand new and a record needs to be created for them.
 - move on to Hire BP and choose "create new pre-hire record."
 - Type in as much information as you currently have on employee. (First, middle, last name, email, etc.)

The screenshot shows a form field labeled 'Supervisory Organization' with a red star icon. Below the field are two radio button options: 'Existing Pre-Hire' and 'Create a New Pre-Hire'.

○ Hiring:

- Reminder: An employee may not start work before completion of a background check.
- Candidates must be moved through stages of the Job Application process in the following order:
Interview => Reference Checks => Offer => Background check

*** Please ensure managers do NOT move the candidates through the process using the candidate grid. Doing so bypasses a critical step for the Recruiting Partner to review for duplicates.

- When a candidate is moved to “Ready for Hire” via Workday recruiting OR when you begin the Hire BP for an temp/casual position, student worker, graduate assistant or budgeted position previously recruited and selected through GreatJobs, please obtain the UIN as you have in the past by using

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UIN Manager. Include the UIN in the comment box before submitting the Hire. [The UIN *Partner* is a centralized role and for AgriLife the UIN is obtained at the unit level]

- *If Workday Recruiting is not used, it is critical that duplicate pre-hire records not be created. Please see instructions below.
- During the Hire process, submit the following documents to via Laserfiche to WIP-Payroll. **Because of the time involved in the final step of putting an employee on the payroll, please submit these documents well in advance of the start date:**
 - Background check completion email
 - Copy of Social Security Card if available at this time
 - If applicable:
 - Offer letter if budgeted position and not hired through Workday recruiting
 - Application for Temp/Casual Positions, AG-402 (not required for student assistant positions)
 - Statement of Selective Service Registration Status, AG-401 (all males 18-25 yrs. of age) On-line Verification of Selective Service Registration (unless exempt)
 - Glacier Tax Summary Report & Required Forms & Documents (for foreign nationals)
 - Export Control Check (for all foreign nationals except J-1s) Employment Verification Eligibility
 - Minor's Employment Release, AG-416 (if under 18) certification of age document, if needed (DL, passport, birth cert, shot record, etc.)
 - Statement of Previous State Employment, AG-419 sent to previous employer(s)
 - Request to Hire (required for Extension County Programs non-classified positions)
 - For 02 Faculty: Approval to Hire (on campus) / Tenure Track (on campus) / If 12 month appointment, approval to accrue leave form
- If not provided earlier, please provide on the date of hire:
 - Copy of Social Security Card. (For foreign nationals, please provide as soon as possible.)
 - Form I-9, paper version (only when a Transfer between Companies and a previous I-9 exists in Workday)
- **I-9:** Please make sure to review section 1 before signing section 2 to ensure it is completed correctly. A social security number is required for E-verify. If the employee is a U.S. citizen, please send it back and have the employee enter the SSN. If the employee is a foreign national without a SSN at this time, submit and corrections will be made when they obtain a SSN.
- **Assign Costing Allocation:** Please do not skip the assign costing allocation step.
- **Transfers:** Receiving unit should initiate the transfer (Change Job BP) so that the offboarding tasks route to the appropriate HR Contact.
- **Extending employment:** We have seen several instances of units who intend to extend the term or employment for a position, typically graduate assistants, by submitting a costing allocation change with date changes to the fund sources. This will NOT extend an individual's 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.

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- **Salary Rate/Change Job BP:** Each time you make an adjustment to term, percent effort, or rate Workday will require you to “verify” the salary and click the check mark. If you do not verify the rate the compensation will be changed to zero.
- **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.)
- **Terminations:** Terminations should be initiated by the HR Contact rather than the manager to ensure offboarding tasks trigger to the correct roles. When you start a separation (termination) business process in Workday, you must enter the employee’s termination date differently than the EPA process. With the 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.
- **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, otherwise the position will be benefit eligible.

Worker Type	★ X Employee
Worker Sub-Type	★ X Temporary/Casual Staff (Fixed Term)