

BUSINESS PROCESS INFORMATION

- ❖ If a Business Process allows for a Partner or Departmental role (HR Contact, Recruiting Coordinator, Talent Analyst, I-9 Processor, Absence Partner, Manager) to perform a task, it will be done by the Departmental role.
- ❖ If a Business Process allows for a Manager or HR Contact/Recruiting Coordinator to perform a task, the unit may decide which they prefer. See *Business Processes Initiated by Manager or HR Contact* at <https://agrillifeas.tamu.edu/hr/workday/>

Job Application

- Recruiting Coordinator monitors job requisitions to perform initial review of candidates (no notification or inbox item when candidates apply). Must be completed before manager can begin screening process.
- Manager role screens candidates but this task can be delegated to the Recruiting Coordinator or other appropriate individual.
- Candidates should be moved through stages of the Job Application process in the following order: **Interview => Reference Checks => Offer => Background check**
- Disperse candidates later in process to avoid them being notified while selection process is ongoing.
- Rate Candidate **Interview** – Do NOT enter comments when rating the candidate interview. Interview questions and responses should be documented and kept in the recruiting file in Laserfiche.
- **Reference Check** – Enter contact information for reference check. Do NOT enter comments made by person providing reference check.
- **Offer Letter** – AgriLife will NOT use the Workday provided template. Templates similar to what are used today will continue to be available for units to cut and paste into Workday in place of the Workday format. Leave Workday fields, such as name, salary, etc. intact.

Hire

- “Ready for Hire Checklist” is an inbox actions for the Recruiting Partner. The Recruiting Partner will delegate the inbox task to the Recruiting Coordinator for completion.

Onboarding

- Applicants should NOT upload documents as part of the I-9 process. Units will continue the current process of reviewing original documents. A Social Security Card will still be required for payroll purposes. Continue to submit a copy of the Social Security Card in Laserfiche at the time the UIN is obtained.

- Absence Partner Tasks – Departmental Absence Partners will receive the following To Do steps during onboarding.
 - To Do: Update Time Off Service Dates (ADD 6 months to hire date unless direct transfer). If prior state service is verified this date will need to be changed.
 - **Contact Doris Tykal to confirm data to be entered BEFORE entering the information and submitting these To Do Steps.**
 - To Do: Confirm prior state service (employee submits <https://agrilifeas.tamu.edu/documents/ag-419.pdf>) ; update hazard and longevity service plans. Update vacation and sick time offs for any balance being transferred in.
 - To Do: Confirm Restoration of Balance.
 - Note: The Absence Partner is routed a task to confirm and update employee service information and time off balances for employees transferring from a Texas State agency, college or university.

Lump Sum Payments for Annual Leave

- AgriLife will not use “Request one-time payment” business process for lump sum payments. Skip this step during termination process.

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.

Performance Evaluation Talent Management/Goal Setting

- AgriLife will use attachment only option in 2018. Performance evaluations will be completed in the same time-periods but must be uploaded during a specific timeframe TBD.
- Additional Managers and Reviewers – AgriLife will NOT use this functionality.
- Goals –AgriLife will NOT use the annual goal setting functionality.

Actions or approvals that are still required but will be handled outside Workday

- Salary approvals required by procedure (same as today) - hiring salary or reclass above lower band (or middle band if Research Title) or if over 10% for titles not in pay plan
- Request for Compensation for Contribution to a Continuing Education or Other Extra Curricular Activity (AG-519)
- I-9 paper form required if dual employment with different System members
- County Agents – Request to Hire
- Calculation of Lump Sum Annual Leave Payment (AG-510)
- Save for Summer Authorization, formerly Extended Pay Plan (AG-506)
- Approval for sick leave pool withdrawals (AG-434)
- Sick leave pool contributions (AG-433)
- Sick leave direct donations – donor (AG-444); recipient (AG-445)
- Alternate work location requests (AG-438); agreement (AG-439); checklist (AG-441)
- Reasonable workplace accommodation request (AG-435)
- Cellular Communication Equipment Reimbursement Request (AG-514)
- Relocation Allowance Payment Guidelines and Form (AG-516)
- Extension County holiday submissions

Actions currently done on paper that will be eliminated

- Employee Personal Data Sheet (HR-181)
- W-4 form
- Direct Deposit Authorization Form (AG-501)
- Agreement for Dual Employment of an Employee Resulting in Multiple Payments (AG-509)
- Cellular Communication Monthly Service Allowance Enrollment (AG-515)
- ORP and TDA enrollment and vendor change forms
 - HR 11 – Prior ORP Participation Form
 - HR 14 – ORP Salary Reduction Acknowledgement/Change of Vendor Form
 - HR 17 – TDA Salary Reduction/Change of Vendor Form

In Workday, the employee will be able to choose and change vendors online for the ORP and TDA programs as well as change their contribution amount for the TDA plan. There will be guidance to lead employees to the Retirement Programs website containing all the vendor microsite links and the list of consultants for each vendor in order to assist them in making these decisions and completing vendor applications. Default investments have been chosen at all vendors if the employee does not finish this process. Vendors will reach out to any employee that does not complete an application and choose an investment allocation.



Wage Positions (Workday term is *Temp/Casual Worker type*), Student Workers, Graduate Assistants

A position must be created in Workday for all positions, including wage, students and graduate assistants before an individual can be hired. Units may continue the current practice of choosing whether to post these types of positions. If a job requisition is posted the candidate data will already exist in Workday when the Hire process begins. If the position is not posted in Workday (by creating a job requisition) additional information must be entered during the Hire BP to create a

“pre-hire”. Always search before creating a new pre-hire to ensure the individual is not a current employee.

Compensation vs. Payroll – Compensation is what an employee is eligible for. Payroll is what they’re actually paid.

Delegation - Employees with Department Head security role have an approval step in the following BPs and may choose to delegate the BP or task:

- Propose Employee Merit Award
- Request Compensation Change
- Create Job Requisition
- Create Position
- End Additional Job
- Termination
- Add Additional Job
- Change Job
- Request One-Time Payment

Extra payments, such as cell phone allowances, will be paid on the employee’s regular pay cycle rather than as a separate payment.

I-9: Required for each company. If employee holds position at more than one company, the additional jobs will require paper I-9s.

Location: Location is the geographic city where the job is expected to be performed. Location is used in recruiting to post jobs, used in Safety Incident tracking buildings, employee payroll tax eligibility and finance information. Due to its use in multiple functionality, Location city is associated with the System Member Part, not the Workstation.

Location on Converted Vacant Positions: During conversion, vacant positions could not be identified with the actual geographic city that would be Location in Workday. This means that in Workday, the open position reflects as being the main office site of the System Member, i.e. College Station, except the position if advertised or filled would be working in Abilene. If the position would actually work in a different city locale than the System Member main office, use Edit Position Restrictions to correct the location before Creating a Job Requisition.

Onboarding

- New Hires living in Texas will “skip” the step during onboarding that asks them to complete state and local withholdings and elections.

Revised 1/23/18

Reclassification - Select “Promotion-reclassification” so action routes properly to Executive Approver. Reclassification/Promotion requires 2 business processes be initiated:

- Edit Position Restrictions (if position vacant this is only step required)
- Change Job

Recruiting File documents that do not exist in Workday should be stored in Laserfiche.

Request One-time Payment - Paid off salary source accounts unless worktag entered for separate account.

Social Security Card will still be required for payroll purposes. Continue to submit in Laserfiche when the UIN is obtained.

UIN - UIN Managers will continue to obtain the UIN and will then enter the UIN in a comment field during the Hire process.

Worker Types: Faculty, Graduate Assistant, Staff, Student Worker, Temporary/Casual

○ **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 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)

Revised 1/23/18

- 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.

Revised 1/23/18

- **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)



- Create a pre-hire without searching to see if they're a current employee.
- Close a position. Only in rare circumstances do you want to close a position.
 - Edit service dates for anything other than Time Off Service Date, which is required entry when hiring as it determines whether new employee is eligible to use vacation immediately or after 6 months.
- Upload documents, especially those containing medical or security sensitive information. Workday is not a document management system and documents should be uploaded only in rare circumstances.
- Add confidential medical information in comments section on leave requests.