Employee Self Service
Participant Guide

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PARTICIPANT GUIDE

ABOUT THIS GUIDE

This guide includes Participant Activities to work through as self-directed Employee Self Service training. Follow along in the system to practice transactions.

LOG IN TO THE WORKDAY SYSTEM

Follow these steps to log in to Workday:

1. From the CMSD Website, click Staff > Workday

2. Click the quicklink to access the Workday system

3. Enter your CMSD email address
   Enter your CMSD email password
# GLOSSARY

<table>
<thead>
<tr>
<th>Name</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inbox</td>
<td><img src="image" alt="Inbox Icon" /></td>
<td>View Actions you must take and Archives of past actions you have taken including business processes initiated by you.</td>
</tr>
<tr>
<td>Personal Information</td>
<td><img src="image" alt="Personal Info Icon" /></td>
<td>Change your contact and personal information (such as addresses, email, and phone numbers,) emergency contacts, photo, legal name, preferred name, and government IDs.</td>
</tr>
<tr>
<td>Pay</td>
<td><img src="image" alt="Pay Icon" /></td>
<td>Access withholding elections and payment elections. View payslips, total compensation, bonus and one-time payment history, tax documents, and allowance plans.</td>
</tr>
<tr>
<td>Time</td>
<td><img src="image" alt="Time Icon" /></td>
<td>Enter your work time and information about supplemental pays. Employees not using SmartFind Express can also enter their absences in this worklet.</td>
</tr>
<tr>
<td>Directory</td>
<td><img src="image" alt="Directory Icon" /></td>
<td>View information about other workers in the company, including work address and phone number. Also, view your organizational chart, management chain and organizations to which you belong.</td>
</tr>
<tr>
<td>Name</td>
<td>Icon</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>6 Time Off</td>
<td>![Icon]</td>
<td>View your time off and time off balance. Request time off (if appropriate for your role), including time off corrections and Leaves of Absence.</td>
</tr>
<tr>
<td>7 Benefits</td>
<td>![Icon]</td>
<td>Change benefits, beneficiaries, and dependents. View your benefit elections and current benefits cost.</td>
</tr>
<tr>
<td>Name</td>
<td>Icon</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------</td>
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<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Profile Photo (Main Menu)</td>
<td></td>
<td>Displays your profile photo with a blue badge for pending Notifications and red count badge for Inbox items, and these menu options:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- View Profile - displays your worker profile.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Home - displays the Home landing page.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Inbox – These are items requiring an action from you.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Notifications – These are items to be aware of but may not require action from you.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Sitemap - a list of the standard reports and tasks available to you, sorted by category.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Favorites - a configurable list of favorite tasks, reports, business objects, and custom / shared custom reports available to you, sorted by category.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- W: Drive - a virtual drive (not a mapped drive on your computer) where you can store generated reports.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Documentation - a link to the Workday Documentation on Workday Community.</td>
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<tr>
<td></td>
<td></td>
<td>- Help – depending on your set up, this is a link to a third party or internal resource.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- My Account - provides access to these account management tasks:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Change Password</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Change Preferences</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Switch Accounts (if you are a delegate)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Sign Out</td>
</tr>
<tr>
<td></td>
<td>Name</td>
<td>Icon</td>
</tr>
<tr>
<td>---</td>
<td>--------------</td>
<td>------</td>
</tr>
<tr>
<td>9</td>
<td>Home</td>
<td>![Home Icon]</td>
</tr>
<tr>
<td>10</td>
<td>Search</td>
<td>![Search Icon]</td>
</tr>
<tr>
<td>11</td>
<td>Workday Logo</td>
<td>![Workday Logo Icon]</td>
</tr>
<tr>
<td>12</td>
<td>Related Actions</td>
<td>![Related Actions Icon]</td>
</tr>
<tr>
<td>13</td>
<td>Worklets</td>
<td>![Worklets Icon]</td>
</tr>
<tr>
<td>14</td>
<td>Org Chart</td>
<td>![Org Chart Icon]</td>
</tr>
</tbody>
</table>
NAVIGATION

OVERVIEW
When you log in to Workday, the Home page displays. From the Home page, you access all personal information, such as emergency contacts, paid time off balances, payment elections, federal tax information, name and address, and much more. The banner contains Workday global navigation functions, such as Search, Home, and your main menu, which provides access to your Inbox, Worker Profile, and Notifications.

The icons on your Home page provide access to worklets – groups of related tasks, reports, and links. These worklets are organized by functional category and represent different tasks or work you can perform.

ACTIVITY
List the name of the objects below next to their related number.

<table>
<thead>
<tr>
<th>#</th>
<th>Name</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
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<tr>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
CONFIGURE WORKLETS

OVERVIEW
You can add and change the position of Worklets appearing on your home page by using the gear icon just below your photo. Click the gear and click the plus sign under the Optional Worklets column. Search for worklets using the prompt list or type the name of the one you want. Click OK and then Done.

ACTIVITY

- *Add the Directory Worklet to your home page.*

SEARCH

OVERVIEW
You can perform searches on targeted areas of Workday, or expand them to include all of Workday. By default, the focus of a typical search is on the most common areas of Workday.

To change the focus of your search, you can select the distinct area of Workday to search from the Categories list. Or, you can expand your search by selecting **All of Workday**.
ACTIVITY

- Search for a person by using a common name where you may get several results and select All of Workday to view results in your entire organization.

Search for a school.

RELATED ACTIONS

OVERVIEW

When the Related Actions icon displays next to an object, other actions and tasks are available related to that object. Employees can use the Related Actions functionality to view data and accomplish tasks related to their own employee records, such as changing a legal name, requesting time off, or submitting an expense report.

ACTIVITY

Click the Actions icon under your name in your Worker Profile and view your total compensation, current benefits and beneficiaries, and personal information.
ORG CHART

OVERVIEW

- Below is an example of a supervisory structure.
- Each box is a position. The boxes with yellow at the top represent a supervisor and those with blue are individual contributors. Supervisory organizations list the organization’s name above the box.
- It groups workers into a management hierarchy.

From your Worker Profile, select View Team to view your organization’s org chart. The chart will allow you to see your team and other teams that are connected to yours.

You may use the Related Actions button to view the Org Chart for any Supervisory Organization in Workday.

ACTIVITY

- Use the Team button to find the Org Chart for your school or work location.

- Who is your manager’s manager? __________________________

PERSONAL INFORMATION WORKLET

OVERVIEW

The Personal Information Worklet contains your Personal and Emergency Contact Information. Employees are able to update this information real-time so this information remains current.

ACTIVITY

- Add the name and phone number of an Emergency Contact.
WORKER PROFILE

OVERVIEW
Your Worker Profile contains personal information about your, your job, your career and more.

From the upper right hand corner of the screen, click the Profile icon > View Profile to access your Worker Profile page.

Each section in the Worker Profile contains tabs and links, organized by categories such as Job, Contact, Career, and Time Off.

ACTIVITY
- Under the Contacts tab, view Support Roles. List one person identified as your Absence Partner:

_______________________

INBOX

OVERVIEW
The Inbox contains Actions for you to complete and an Archive of all Business Process actions you have taken.

FEATURED WORKLETS

OVERVIEW
Common worklets you can take actions and views from include:

- Personal Information –update emergency contact information and more
- Benefits –view and change benefits elections in cases of life change
- Pay –view pay slips and change direct deposit/paycard information
- Time –enter & submit time worked
- Time Off –view your leave balance and request time off, if applicable
- Career -find jobs and apply for jobs at CMSD
PAY WORKLET

OVERVIEW

The Pay worklet allows employees to view payslips, total compensation, their one-time payment history, tax documents, and allowance plans. Employees are also able to change their withholding elections and payment elections. You are able to update your pay card and bank account information at any time.

Payslips will be accessed 24/7 from the Pay worklet; payslips will no longer be mailed. Current direct deposit and paycard account information will be carried over into Workday.

VIEW PAYSILP AND TAX DOCUMENTATION: ACTIVITY

- Locate your payslip. How many payslips currently exist? __________
- View your One-Time Payment History. Although it is blank now, this is where you will see Differentials and Supplemental Pays.
- Navigate to your tax documents.
ADD/MODIFY PAYMENT ELECTION (DIRECT DEPOSIT/PAYCARDS): OVERVIEW

Employees may elect to send payments to multiple accounts. When you have multiple accounts listed, there can only be one "Balance" election and it must always be last on the list after any percentage or fixed amount elections. Your elections should look something like this:

![Payment Election Table]

Note: Accounts with fixed amounts are entered first. You must select the "Balance" for your last account.

TO ADD/MODIFY PAYMENT ELECTION: ACTIVITY

- Add an additional account for vacation fund.
  1. Click the Payment Elections button under Actions.
  2. Click the Add Account button and enter the following information:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Entry Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCOUNT TYPE</td>
<td>Checking</td>
</tr>
<tr>
<td>BANK NAME</td>
<td>Wells Fargo</td>
</tr>
<tr>
<td>ROUTING TRANSIT NUMBER</td>
<td>121000248</td>
</tr>
<tr>
<td>ACCOUNT NUMBER</td>
<td>123456789</td>
</tr>
</tbody>
</table>

3. Click OK > Done to save.
BENEFITS WORKLET

With the advent of Workday, benefits deductions will be prorated for both 10 and 12 month employees, respectively, ending the need for double deductions in May and June!

Workday allows employees to view their benefits elections and print benefits statements real-time. In cases of qualifying life events, employees can update their benefits elections independently by following the prompts in Workday and uploading the required documentation within 30 days of the qualifying life event. Change your benefits elections by clicking on Change > Benefits (Step 1 in screen shot below).

Information about employee retirement plans and investment contributions may also be viewed from the Benefits worklet. Employees with retirement plans may update their beneficiary information at any time.

MOBILE

Employees can use the mobile version of Workday for many functions. Use the Job Aid on the Workday@CMSD website > Getting Started to download and get connected!

However, remember... Non Exempt employees in areas with time clock units (Bus Depot, Central Kitchen) must use time clocks for time tracking if clocks are operational.

Note: Some functionality may not be available on the mobile app.
GETTING STARTED AT GO-LIVE

When CMSD goes live with Workday, you will access the system from the CMSD Workday Webpage or from a time clock at select high-volume locations. **You will use your CMSD Network Password to log in. If you use a shared computer, please be sure to log out after each use so that your information remains private.**

When we go live, you will use your **CMSD Network Password** to log in.

🌟 **Important:** For shared computers, be sure to **log out after using!**

Here is what you will need to do at Go-Live:

**Day One of Go-Live**
- Log in and enter your time worked
- Update your emergency contact & other personal info
- Validate your benefit information and leave balances
- Validate your direct deposit or paycard information
- Validate info on your position title and organizational structure
  
  *If title or org structure is not correct, use “Contact Us” to let us know!*

**Ongoing**
- Enter and submit your time worked for your manager approval
RESOURCES AND OTHER HELPS

Find additional Employee Self Service training helps including videos and step by step instructions 24/7 on the Workday@CMSD [Getting Started > Employee Webpage].

Have comments or suggestions for improvement? Share them with us by using the Contact Us link on the CMSD Workday Webpage!