

# Manager Self Service



## Participant Guide

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# WELCOME TO WORKDAY

## ABOUT THIS GUIDE

This guide includes Participant Activities to work through during your self-paced Manager 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**

Workday

Work or school, or personal Microsoft account

Email or phone

Password

Keep me signed in


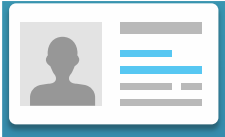


Sign in




Can't access your account?

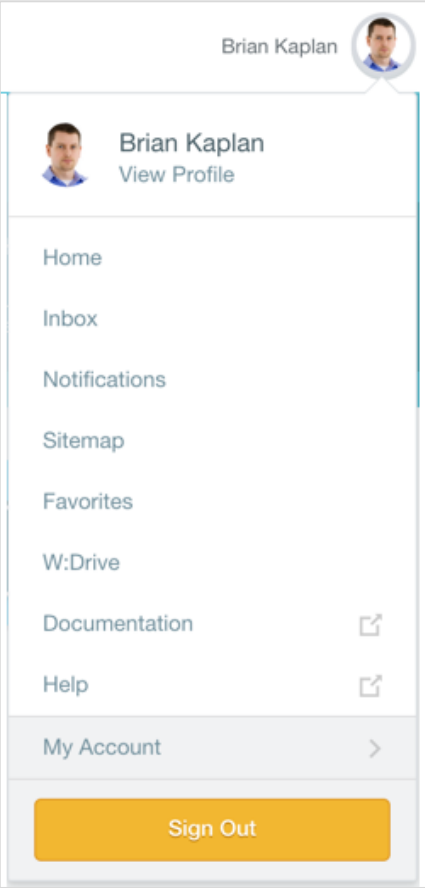
## EMPLOYEE SELF SERVICE OVERVIEW

This section is a review of Employee Self Service options covered in the Workday Videos. In this section we will also address how you enter your time worked, request time off, and submit a Leave of Absence.






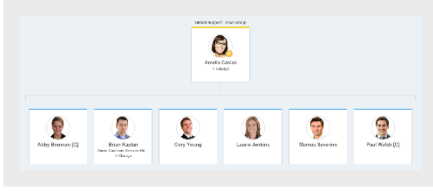
## GLOSSARY

	Name	Icon	Description
1	Inbox		View Actions you must take, Archives of past actions you have taken, and Notifications including the status of Business Processes initiated by you.
2	Personal Information		Change your contact and personal information (such as addresses, email, and phone numbers,) emergency contacts, photo, legal name, preferred name, and government IDs.
3	Pay		Access withholding elections and payment elections. View payslips, total compensation, bonus and one-time payment history, tax documents, and allowance plans.
4	Time		Enter your work time and information about supplemental pays. Employees not using SmartFind Express can also enter their absences in this worklet.

	Name	Icon	Description
5	Directory		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.
6	Time Off		Request time off, including time off corrections and Leaves of Absence. View your time off and time off balance.
7	Benefits		Change benefits, beneficiaries, and dependents. View your benefit elections and current benefits cost.

	Name	Icon	Description
8	Profile Photo (Main Menu)		<p>Displays your profile photo with a blue badge for pending Notifications and red count badge for Inbox items, and these menu options:</p> <ul style="list-style-type: none"> <li>• View Profile - displays your worker profile.</li> <li>• Home - displays the Home landing page.</li> <li>• Inbox - These are items requiring an action from you.</li> <li>• Notifications - These are items to be aware of but may not require action from you</li> <li>• Sitemap - a list of the standard reports and tasks available to you, sorted by category.</li> <li>• Favorites - a configurable list of favorite tasks, reports, business objects, and custom / shared custom reports available to you, sorted by category.</li> <li>• W: Drive - a virtual drive (not a mapped drive on your computer) where you can store generated reports.</li> <li>• Documentation - a link to the Workday Documentation on Workday Community.</li> <li>• Help – depending on your set up, this is a link to a third party or internal resource.</li> <li>• My Account - provides access to account management tasks:             <ul style="list-style-type: none"> <li>○ Change Password</li> <li>○ Change Preferences</li> <li>○ Manage Password Challenge Questions (if enabled)</li> <li>○ Switch Accounts (if you are a delegate)</li> </ul> </li> <li>• Sign Out</li> </ul>



	Name	Icon	Description
9	Home		Navigates you back to the home page.
10	Search		Find and go directly to the tasks and reports of interest to you.
11	Workday Logo		Display your home page.
12	Related Actions		Perform additional actions on an object. Possible actions include viewing your current benefit elections, editing your contact information and requesting time off.
13	Worklets		Access tasks and information you use on a regular basis via a “tile” on the My Workday page. Worklets link to configured reports and related tasks and links within Workday. Ex. Benefits, Pay, Time and Expenses Worklets
14	Org Chart		View how an organization is structured. It outlines the roles, responsibilities, and relationships between individuals within an organization.

## NAVIGATION & ESS WORKLETS

### OVERVIEW

When you log in to Workday, the Home page displays. From the Home page, you can access your personal and team information, such as your contact information or your team's performance, compensation, and time off data. The banner at the top contains Workday global navigation functions, such as Search, Home, and your main menu, which provides access to your Inbox, Worker Profile, and Notifications.

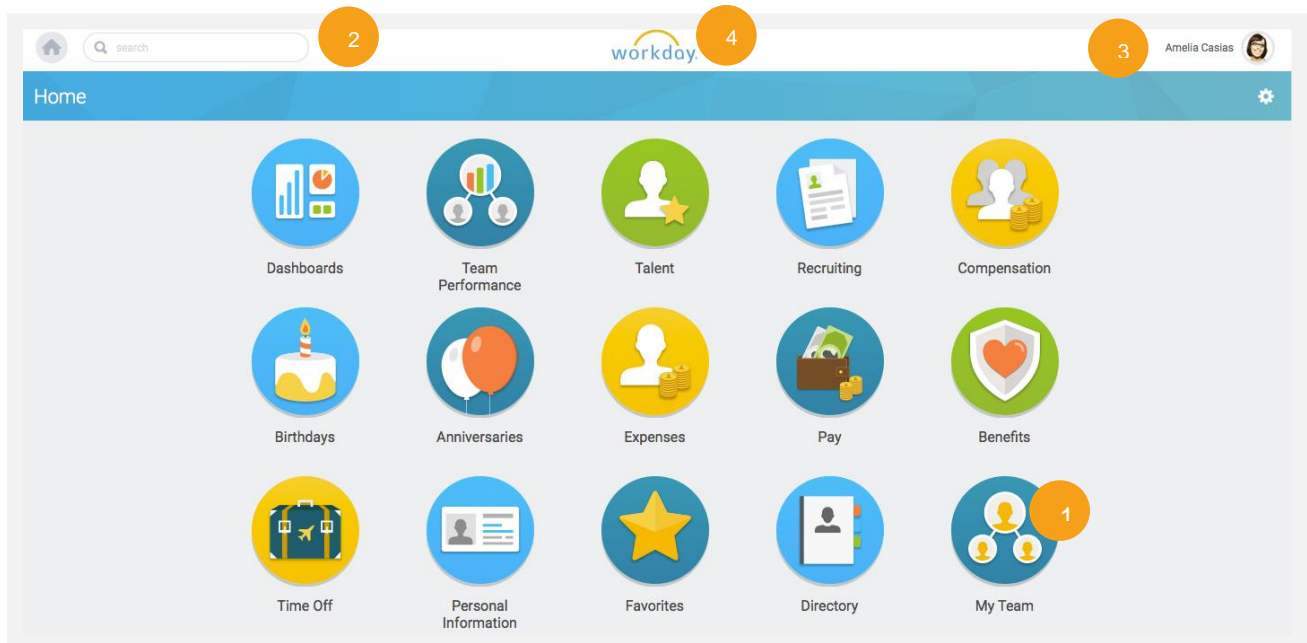
The icons on your Home page provide access to worklets – groups of related tasks, reports, and links. These worklets are organized by functional category and represent different tasks or views you can perform.

### ACTIVITY

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



Your Home page may differ based on your role and your organization's Workday feature and functionality.



#	Name	Notes
1		
2		
3		
4		

## 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:

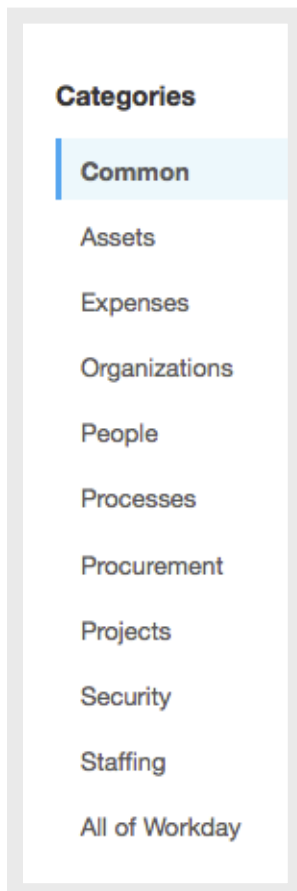
- **Add the Directory Worklet to your home page.**

## 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 school (it will be a Supervisory Org).***

## 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.

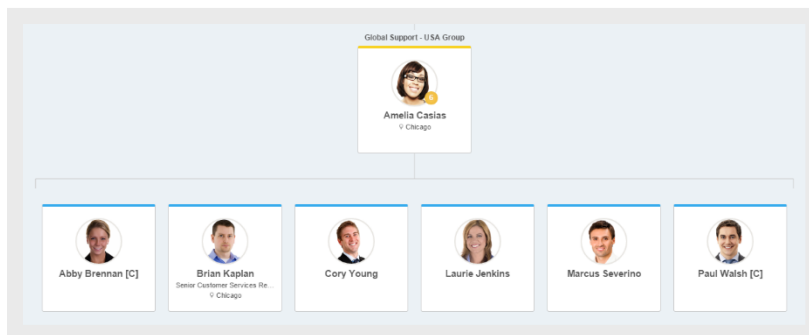
## ORG CHART

### OVERVIEW

- Below is an example of a supervisory structure.
- Each box is a position. Boxes with yellow at the top represent a supervisor and those with blue are individual contributors. If it is a supervisory org it will have the org name above the box.
- It groups workers into a management hierarchy.

From your Worker Profile, select **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.**

## WORKER PROFILE

### OVERVIEW

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

You can 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, Personal, and Time Off.

### ACTIVITY

- **Under Contacts, add the name and phone number of an emergency contact**

- ***View Support Roles from Contact. List one person identified as your Absence Partner:***
- 

## INBOX & NOTIFICATIONS

### OVERVIEW

Any actions you are required to take within Workday will be sent to your Inbox as a task to complete. You can view details and take action on these Inbox tasks. All completed tasks and/or actions you have taken will be stored in the Archive tab. You can find the status of events you have initiated or actions you have completed in the Archive tab.

The Inbox is the way you will typically receive electronic time sheets and time off requests from your employees. When you review and process items these items, you can expand these to view additional details about the submission. Your choice of actions include approve, deny, cancel, or send the submission back to the employee for revisions. Inbox items may also be delegated or reassigned to another worker on a temporary basis.

### MANAGE YOUR DELEGATIONS

When you are out of the office or need extra help handling your Inbox, you can delegate all your Inbox tasks or specific business process tasks. Typically this would be someone on your management team or one of your peer managers.

For example, you may want your co-worker who is filling in for you to approve time submittals on your behalf. Note, CMSD follows a Dual Control process. When managing delegations for approving time it is important that this task is not delegated to the person who normally serves as a TimeKeeper.

You may also delegate the ability for a team member to initiate a Business Process on your behalf. When doing this you must identify the Business Process you wish to delegate.

Note, when others take action on tasks that you have delegated, they are acting in your proxy. You, as manager are still ultimately responsible for actions taken on your behalf.

### ACTIVITY

- ***Navigate to your Inbox from the Home Pages or your Profile.***
  - ***View the items in your Inbox (but do not take action on them yet)***
  - ***Delegate Inbox tasks to your secretary, if applicable, or a peer.***

## 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.

### ADD/MODIFY PAYMENT ELECTION: 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:

The screenshot shows a table titled "Payment Elections" with 3 items. The table has columns for Order, Country, Currency, Payment Type, and Account. To the right of each row are radio buttons for "Balance", "Amount", and "Percent", along with input fields for values.

Order	*Country	*Currency	*Payment Type	Account	*Balance / Amount / Percent
1	United States of America	USD	Direct Deposit	Wells Fargo *****6789	<input type="radio"/> Balance <input checked="" type="radio"/> Amount 50.00 <input type="radio"/> Percent 0
2	United States of America	USD	Direct Deposit	Personal Savings	<input type="radio"/> Balance <input type="radio"/> Amount 0.00 <input checked="" type="radio"/> Percent 5
3	United States of America	USD	Direct Deposit	Primary Checking	<input checked="" type="radio"/> Balance <input type="radio"/> Amount 0.00 <input type="radio"/> Percent 0

### ADD/MODIFY PAYMENT ELECTION

- o To 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:

Field Name	Entry Value
<b>Account Type</b>	Checking
<b>Bank Name</b>	Wells Fargo
<b>Routing Transit Number</b>	121000248
<b>Account Number</b>	123456789

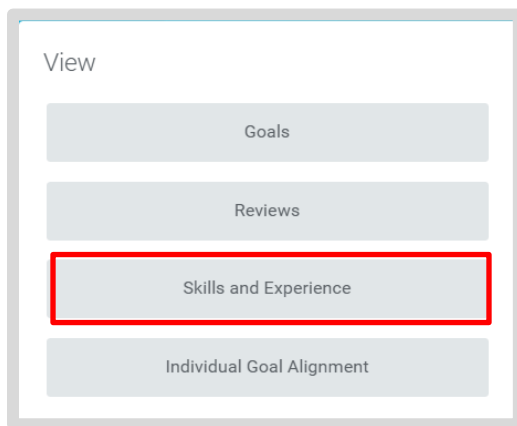
3. Click **OK > Done** to save.

## PERFORMANCE WORKLET--UPDATE LICENSES AND PERMITS

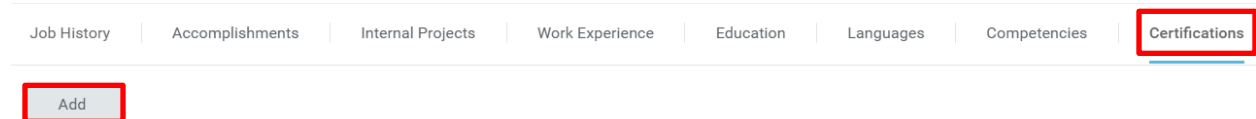
Use the Performance worklet to view and update your Licenses and Permits at any time. The Ohio Department of Education will send the teaching certifications of employees sponsored by the Cleveland Metropolitan School District directly to the District. Upon receipt, a member of the Talent department will enter this certification information directly into Workday. Teaching Employees certified from an outside entity must upload their certification information into Workday independently. This will initiate a business process that requires additional approvals by the Talent department. Teachers can go into Workday to view their certification information any time. Below are instructions to update your own license and permit information.

From the **Performance** worklet:

1. Click **Skills and Experience**.



2. Click on the **Certifications Tab**.
3. Use the **Add** button to upload certification information.



4. Complete the relevant information and click **Submit**.

**You can also access this information from your Profile.** Go to the **Careers tab > Certifications**.



## 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.


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

## REPORTS & DASHBOARDS

### REPORTS & DASHBOARDS

#### DASHBOARDS & REPORTS

Dashboards are customized worklets containing key management information and actionable items related to specific functional areas within Workday. Some dashboards within Workday also contain analytics, menus, and announcements like the Team Performance dashboard.

You can drill down into Links and Related Actions icons  and buttons within dashboard worklets and obtain more information or perform additional actions. Chart-based worklets are also configurable; you can change or configure the worklet chart to display the data in a different format



Use the Dashboard worklet to find reports used most often at Cleveland Metropolitan School District, including:

- Management Reporting Dashboard
- Compensation and Benefits
- Recruiting
- Workforce Planning.

You can also use Search to find useful reports such as View Open Position and Team Time Summary.

#### ACTIVITY

- **Navigate to the Dashboards worklet and select a report.**
- **Click on View More below a report.**
  - **Fill any required information to display the report.**
- **Navigate to the My Team worklet. See the reports listed for viewing from here.**
- **Use Search to find either the View Open Position or the Team Time Summary.**

## TIME TRACKING

### TIME WORKLET FOR YOUR TIME ENTRY

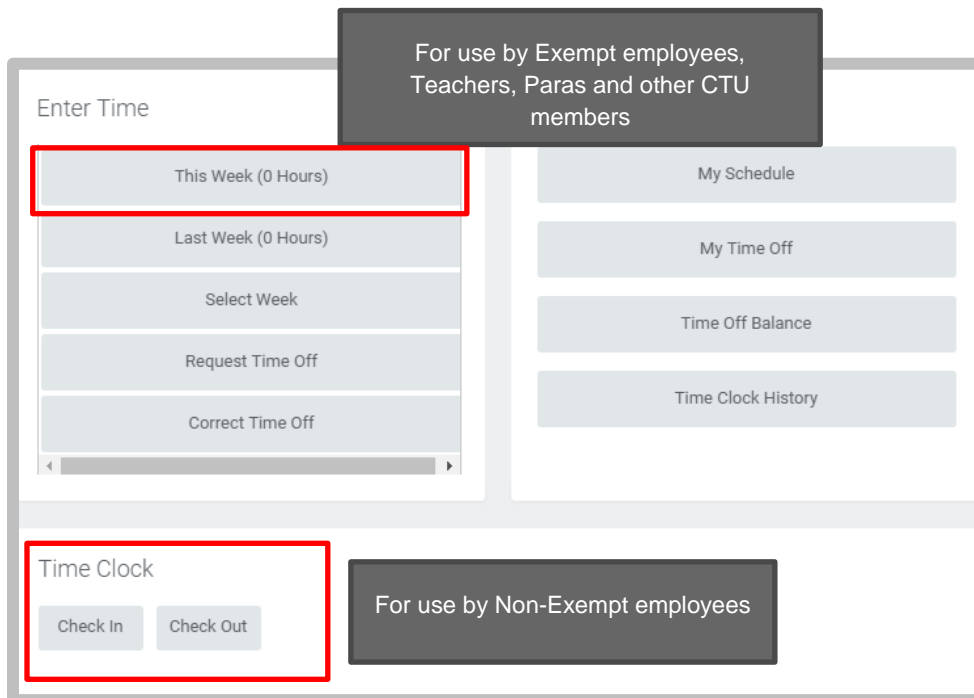
#### OVERVIEW

Workday enables employees to be paid accurately and on a timely basis. All CMSD employees will report their time worked. Accurate time entries should be made on a daily basis, recording the actual time worked. Time must be submitted bi-weekly for timekeeper validation and manager approval. Employees use the Time Worklet to enter their time worked.

- Time is recorded with the **Time Calendar** for *Exempt employees, Teachers, Paras and all other CTU members*.
- Time is recorded with the **Time Clock** for *non-exempt employees*. The Time Clock provides a time stamp and calculates the appropriate lunch hour for employees depending upon their job type. If a non-exempt employee works through lunch with advance manager approval, the employee can change the **Worked Through Lunch** setting to Yes and add a comment.

In addition to regular pay, **Supplemental Pay options** including class coverages are recorded in the Time worklet by specifying the Time Type. Supplemental Pay options are configured to show only those relevant to your job type.

Exempt employees & CTU members are able to correct time entry errors without assistance if time has not yet been submitted. Non-exempt employees must request assistance from their timekeeper or manager to correct time.



## ACTIVITY

- **Enter today's work time in the fashion appropriate for your** job type. (ie: Non-exempt employees click Check In using the Time Clock; Exempt employees and CTU members enter today's work time.)
- For employees eligible for entering Supplemental Pay options, enter the Supplemental Pay option relevant for your job type below:
  - Teachers & Paras: Class Coverage (enter Unit & include teacher's name, date and period you for which are covering)
  - Cleaners: Mat Cleaning
  - Custodians & Assistant Custodians: In Charge
  - Food Service: Working out of classification
  - Secretaries: Working out of classification
  - Substitute Teachers & Paras: Class Coverage
  - Substitute Secretaries: Working out of classification
  - Non-Teaching/Non-Secretary Substitutes: Choose any one from choices
  - Exempt employees: Supplemental Pay options must be added by Managers; No action needed by you for this part of the activity.

## TIME ENTRY AND TIME APPROVAL FOR DIRECT REPORTS

All employees are responsible for daily entering time worked and submitting their time worked for Timekeeper validation and Manager approval on a bi-weekly basis.

You will typically receive time sheets from your employees from your Inbox. From the Inbox you are able to see the details of an employee's time sheet. Below is an example of details available for an employee's time submission:

The screenshot displays the 'Time Entry Approval' interface for an employee named Arron Afflalo (40002) with a total of 21.99 hours. The interface includes a summary section with 'Regular Time' at 21.99, 'Time Offs' at 0, and 'Facility Closed (Days)' at 0. Below this is a table of 'Daily Totals' for three days: Mon, 9/12, Tue, 9/13, and Wed, 9/14, each with a 'Checked In' type and 7.33 hours. At the bottom, there is a section for 'Entries to Approve' with three items, each also showing 7.33 hours. Action buttons at the bottom include 'Approve', 'Send Back', 'Deny', and 'Close'.

Date	Type	Hours
Mon, 9/12	Checked In	7.33
Tue, 9/13	Checked In	7.33
Wed, 9/14	Checked In	7.33

Date	Type	Time Block Reported Quantity	Units	Comment	Details
Mon, 9/12	Checked In	7.33	Hours		Q
Tue, 9/13	Checked In	7.33	Hours		Q
Wed, 9/14	Checked In	7.33	Hours		Q

Managers and Timekeepers can either **Approve, Send Back or Deny** the timesheet. Additionally, Managers and Timekeepers also able to Enter Time directly on behalf of an employee; This practice should be done rarely, on an exception basis. Timekeepers and Managers are able to correct an employee's time sheet, an important function for managers of non-exempt employees.

Employee time sheet errors will be addressed in different ways depending upon the type of time that is in error and how the time was entered.

**Approve** the timesheet if the time appears to be accurate.

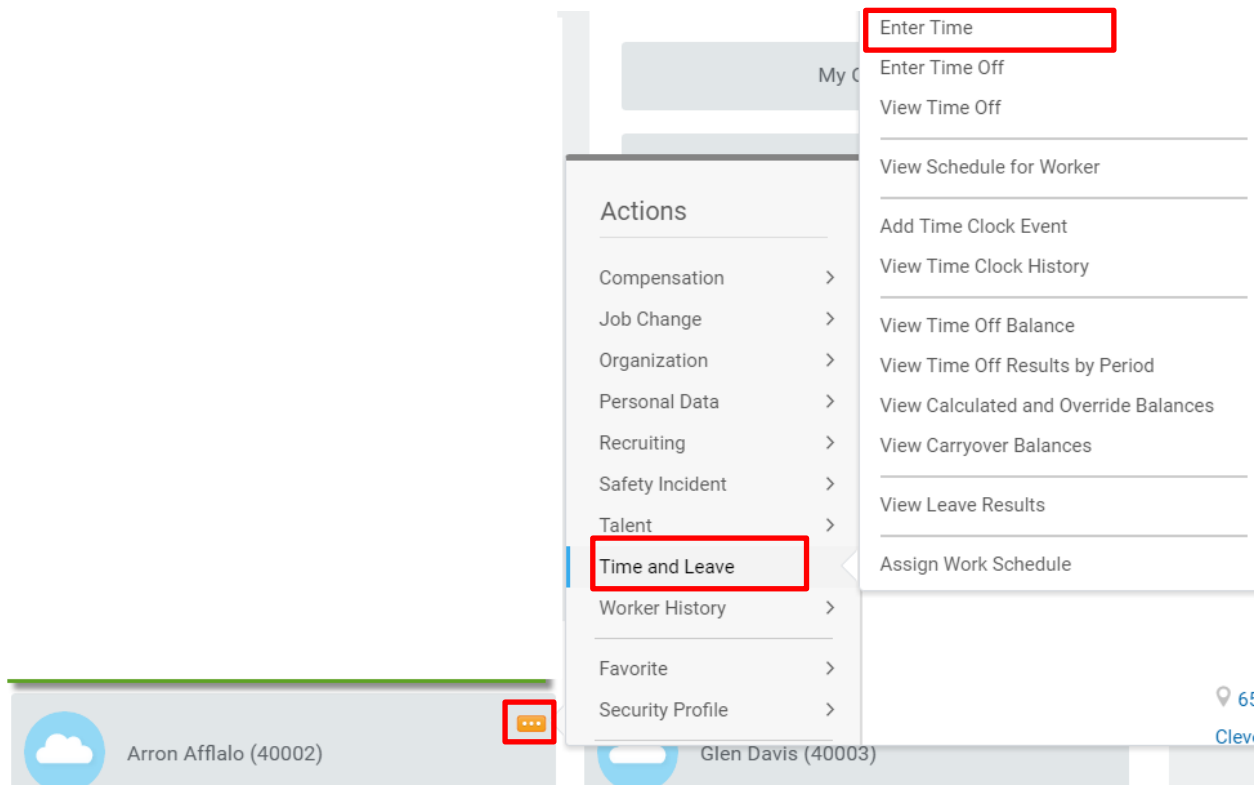
**Send Back the timesheet with comments** if there is an inaccuracy and you would like the employee to correct it. Be sure to add comments about the date or time needing correction. Note: a non-exempt employee using the Time Clock will not be able to correct their own regular time worked in case of error. They will need their manager's assistance to correct their regular time worked.

**Deny** means the time sheet will be returned to the employee in a viewable state but they will be unable to edit it. They will need to re-enter all of their previous time entries.

See the chart below for additional guidance:

<b>MANAGING TIME APPROVALS FOR YOUR DIRECT REPORTS</b>	
<b>MANAGING TIME FOR EMPLOYEES USING TIME CLOCK &amp; WEB CLOCK</b>	
IF	THEN
All Time is Accurate	Approve time
Error in Regular Time Worked	Correct time with comment. An automatic notification is sent to the employee.
Error in supplemental pay	Send back time with comment for employee correction
<b>MANAGING TIME FOR EMPLOYEES USING WEB CALENDAR</b>	
IF	THEN
All Time is Accurate	Approve time
Error in Regular Time Worked	Send back time with comment for employee correction
Error in supplemental pay	Send back time with comment for employee correction

Managers may enter time directly on behalf of their direct reports by using an employee's Related Actions, selecting the Time and Leave tab, and then selecting Enter Time.



Managers can see a summary of all direct reports' Check In and Check Out status from the Team Time Summary worklet. They can also search for the Team Time Summary report to see a summary of all direct reports' Check In and Check Out status

### ACTIVITY

- **Approve an employee's time entry or Send Back with comments**
- **Correct a time submission or enter time directly for an employee**
- **Search for the Team Time Summary report to see the Check In status of team members**

## TIME OFF, TEAM TIME OFF AND LEAVE OF ABSENCE

### TIME OFF WORKLET

Time off refers to time away from work, whether paid or unpaid, and includes vacation, sick days, holidays, and the all-inclusive paid time off categories.

The Time Off worklet is a simple way for some employees to request time off and view leave balances. **Teachers, Paras and Secretaries do not use Workday for reporting Time Off. These employees report time off through SmartFind Express as done previously. An integration between Workday and SmartFind Express auto-populates the Workday web calendars of teachers and paras with their time off reported in SmartFind Express.**

The following guidelines apply to all employees eligible for vacation time:

- Vacation time accrues each pay period. In the past, employees did not have access to their vacation time in the first year. Now employees can take vacation as it accrues.
- Vacation time is accrued in hours and may be taken in hours.
- Vacation time will roll over from year to year. There is no cap—there is no “Use it or Lose it,” with the exception of employees separating from the District. Separating employees can be paid out for the maximum allowance per job type.

The screenshot displays the Time Off Worklet interface, which is divided into two main sections: Request and View. Below these sections is an Available Balance summary.

Request	View
Time Off	My Time Off
Time Off Correction	Time Off Balance
Leave of Absence	Time Off Results by Period
Return from Leave	

Available Balance
58.611 Hours - Sick Leave - Hourly
24 Hours - Special Privilege - Hourly
0 Hours - Vacation



**Note: If you are a Teacher, Para, Secretary or another user of Smart Find Express, do not complete the Time Off Activities.**

## REQUEST TIME OFF

**ACTIVITY 1 – In this activity you will initiate a Time Off request for a doctor’s appointment.**

### INITIATE A TIME OFF REQUEST

From the Home page:

1. Click the **Time Off** worklet.
2. Select the **Time Off** button in the Request section.
3. Click the first work day of next month on the calendar to request four hours off.
4. Click **Request Time Off**.
5. Enter the Type of time off requested. Enter the hours you are requesting off in the Daily Quantity field.
6. Click **Submit** to save your request.

## CANCEL YOUR TIME OFF REQUEST

**ACTIVITY 2 – In this activity, you will cancel your time off request.** Note: Use the Cancel action to cancel time off requests that have *not yet been approved*; once a time off request has been approved, the Cancel action is unavailable and you must use the Correct My Time Off task to modify your time off hours.

### CANCEL TIME OFF REQUEST

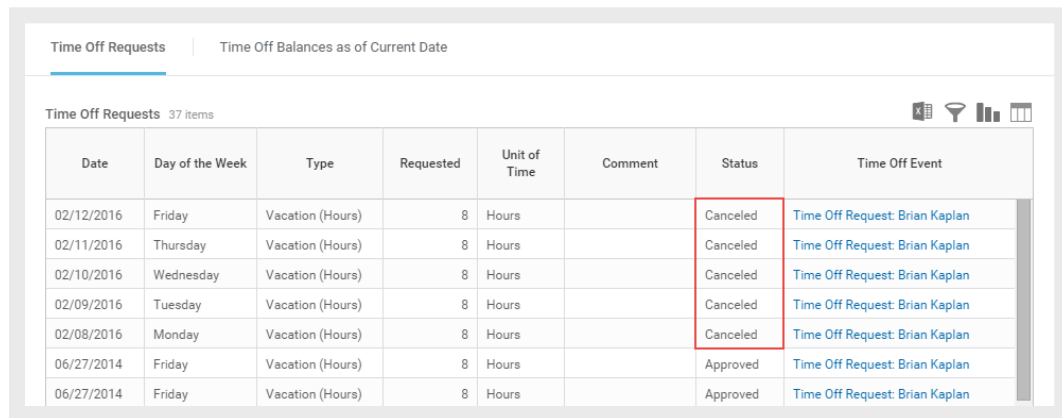
From your calendar in the Time Off worklet:

1. Click on the time off request that you wish to change.
2. Select Cancel this request.
3. Enter an explanation of why you are cancelling your time off request in the Comments section, if necessary and click **Submit**.

### VIEW YOUR TIME OFF

From the Home page:

1. Click the **Time Off** worklet.
2. Click the **Time Off** link in the View section of the worklet. Note that your time off request has been cancelled.



Date	Day of the Week	Type	Requested	Unit of Time	Comment	Status	Time Off Event
02/12/2016	Friday	Vacation (Hours)	8	Hours		Canceled	<a href="#">Time Off Request: Brian Kaplan</a>
02/11/2016	Thursday	Vacation (Hours)	8	Hours		Canceled	<a href="#">Time Off Request: Brian Kaplan</a>
02/10/2016	Wednesday	Vacation (Hours)	8	Hours		Canceled	<a href="#">Time Off Request: Brian Kaplan</a>
02/09/2016	Tuesday	Vacation (Hours)	8	Hours		Canceled	<a href="#">Time Off Request: Brian Kaplan</a>
02/08/2016	Monday	Vacation (Hours)	8	Hours		Canceled	<a href="#">Time Off Request: Brian Kaplan</a>
06/27/2014	Friday	Vacation (Hours)	8	Hours		Approved	<a href="#">Time Off Request: Brian Kaplan</a>
06/27/2014	Friday	Vacation (Hours)	8	Hours		Approved	<a href="#">Time Off Request: Brian Kaplan</a>

3. You can also see the history of transactions in your archive.

### CORRECT YOUR TIME OFF REQUEST

In Workday, you can correct time off requests only after they have been *approved* by your manager; if you want to delete a time off request before it has been approved, you can use the Cancel action. Follow these steps to correct your time off request if your request has been approved.

#### CORRECT TIME OFF REQUEST

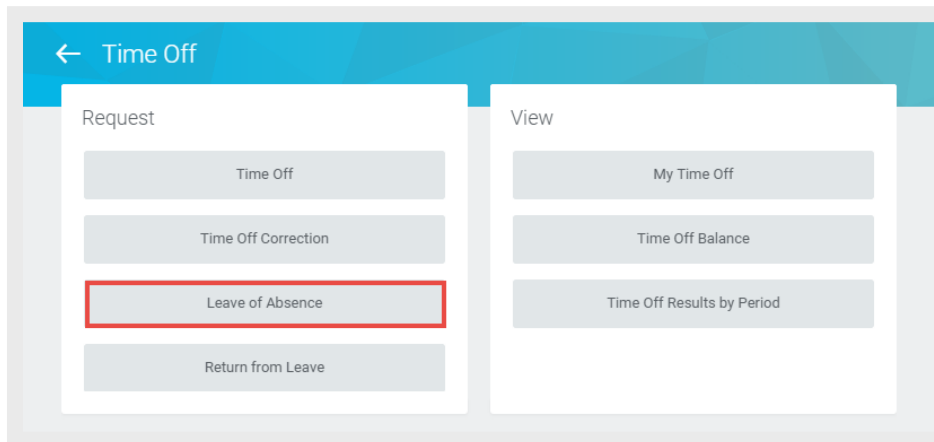
1. Click the **Time Off** worklet.
2. Click the **Time Off Correction** button in the Request section.
3. View the summary page where you can see approved time offs, balances and pending requests.
4. Click the entry you want to correct.
5. Make the change to the request.
6. Click Continue, then Submit.
7. Add a comment if needed.
8. Click Submit, then Done.

## SUBMIT A LEAVE OF ABSENCE

In Workday, you are able to easily submit a Leave of Absence that is timestamped. The criteria for a leave of absence may vary depending on the reason for the leave, and any state or federal laws that define a leave of absence. These instructions are intended to show you Workday functionality, not to replace or supersede the advice of your Human Resources department, your doctor, or the law.


To submit a Leave of Absence, follow these steps from the **Time Off** worklet:

1. Click **Leave of Absence**.



2. Enter the dates in the **Date** fields.
3. Select a **Leave Type** reason. Please refer to your collective bargaining agreement for information on your specific leave policy.
4. Drag files or click the **Select files** to upload any supporting documents that your organization requires.
5. Click **Submit**. Submitting the leave request initiates a business process that includes review and to-do steps for you.
6. Review and agree to the document. To do this, click **Review Documents** to read related documents. Click **Submit**. Subsequent required To Do steps for you will display automatically.
7. Complete the **To Do steps** walking you through required documentation needed before your leave can be approved. Check the acknowledgement statement for each document.
8. Any errors or warnings also display, and may require corrective action. You can click the **Details and Process Arrow** > to view more information.

Documents

Document	 <a href="#">Employee Rights and Responsibilities Under the Family and Medical Leave Act</a>
Instructions	Please read the attached disclosure regarding your FMLA rights and responsibilities.
Signature Statement	I have received the Employee Rights and Responsibilities Under the Family and Medical Leave Act form.
I Agree	<input type="checkbox"/>

Comment

9. Click **Done**.

10. Click **Submit**.

## TEAM TIME OFF

Workday allows you to approve team time off requests, locate attendance records and view employee leave balances so that you can support CMSD’s attendance policy.

Employee Time Off Requests are sent to your Inbox where you can see the type of time off requested and the amount of time requested. Managers are able to Approve, Send Back or Add Approvers. Below is an example of details available for an employee’s time submission:

Review Time Off Request: Victor Oladipo (40004) ⚙️ 🔗

2 minute(s) ago - Due 09/17/2016; Effective 09/15/2016

**For** Victor Oladipo (40004)

**Overall Process** Time Off Request: Victor Oladipo (40004)

**Overall Status** In Progress

**Due Date** 09/17/2016

**Calendars In Use** Consecutive Days (No Calendars Selected)

**Details to Review**

2 items 🔍 📄

Date	Day of the Week	Type	Requested	Unit of Time
09/15/2016	Thursday	Special Privilege (Hours)	3.87	Hours
09/16/2016	Friday	Special Privilege (Hours)	3.87	Hours

➤ Time Off Balance as of Current Date

Approve
Send Back
Add Approvers
More ▼

Managers can view a **Time Off & Leave Calendar** from the My Team worklet to see when employees will be away. Within the View section select **Time Off and Leave Calendar**.

Today < > September 2016 View Month ▼

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15 ✔ Victor Oladipo (40004)	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1

Managers view specific time off balances for their team by searching for the **Time Off Balances & Liability by Organization report**. Identify the organization you wish to view and the time off plans you wish to see (ie: Special Privilege, Vacation Cash Out, etc.). Below is an example of this type of report showing each employee and their balance for specific Time Off plans.

← Time Off Balances and Liability by Organization

Organizations: MLK Elementary (Jacque Vaughn (40001))  
 Include Subordinate Organizations: Yes  
 Time Off Plans: Sick Leave Daily Time Off Plan, Special Privilege Daily Time Off Plan, Special Privilege Hourly Time Off Plan  
 As Of Date: 09/15/2016

13 items

Organization	Employee	Company	Total Annualized Base Pay	Time Off Plan Details				
				Time Off Plan	Unit of Time	Balance	Liability	Currency
MLK Elementary (Jacque Vaughn (40001))	Arron Affalo (40002)	Cleveland Metropolitan School District	42,637.00	Sick Leave Daily Time Off Plan	Days	476.45	109,807.44	USD
				Special Privilege Daily Time Off Plan	Days	0		USD
				Total:		476.45	109,807.44	
MLK Elementary (Jacque Vaughn (40001))	Glen Davis (40003)	Cleveland Metropolitan School District	42,637.00	Sick Leave Daily Time Off Plan	Days	293.2	67,573.81	USD
				Special Privilege Daily Time Off Plan	Days	3	691.41	USD
				Total:		296.2	68,265.22	
MLK Elementary (Jacque Vaughn (40001))	Keisha Knight (40008)	Cleveland Metropolitan School District	46,240.00	Sick Leave Daily Time Off Plan	Days	293.2	73,285.34	USD
				Special Privilege Daily Time Off Plan	Days	3	749.85	USD
				Total:				

Managers are also able to enter time off for a direct report from the employees Related Actions by selecting Time and Leave > Enter Time Off. Managers can correct *approved* time off requests for employees from the employees Related Actions by selecting Time and Leave > Correct Time Off.

**ACTIVITY**

- Approve a Time Off Request
- Enter Time Off for Direct Report
- View the Team Time Off & Leave Calendar (from the My Team worklet)
- Search for the Team Time Off Balances & Liability by Organization Report

## RECRUITING, HIRING, JOB CHANGES & COMPENSATION

### RECRUITING AND HIRING

#### OVERVIEW & STAFFING MODELS

Workday provides managers with increased visibility into all stages of the hiring business process, including the recruiting candidate pool. Managers will also benefit from improved expense management related to staffing needs. The two staffing models used in CMSD recruiting and hiring processes include Position Management and Job Management.

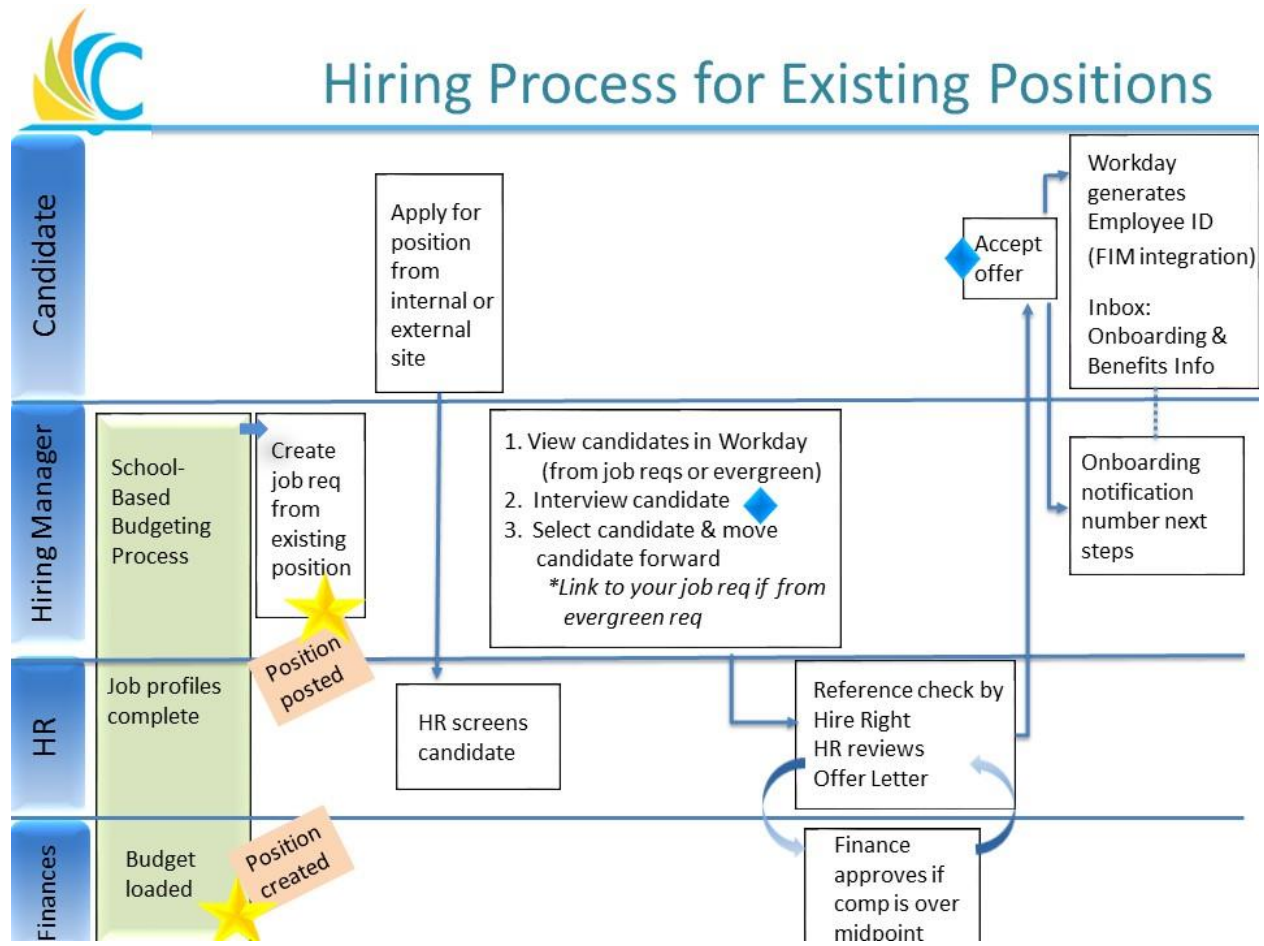
To support our School Based Budgeting process, most positions operate on a **Position Management model**, meaning an approved position must exist before a job requisition can be created and posted. This enables Org Charts to display filled and unfilled positions. Additionally, system security is assigned to positions, so when vacancies are filled new workers in the vacated positions automatically inherit security. All non-substitute and non-Summer School positions operate on a Position Management mode.

Because positions have been approved and budgeted, creating a job requisition is a simple process for managers. For high-demand positions like teachers and secretaries, recruiters have created Evergreen Requisitions which are permanently posted on internal and external sites. When hiring a candidate who has applied to an Evergreen Requisition, you must link that candidate with the unposted job requisition that is specific to your school.

If hiring for a new position not previously budgeted for, Hiring Managers must request that Finance creates a new position, initiating a business process with multiple steps.

Substitute and Summer School jobs operate on a **Job Management model**, meaning you can post requisitions for these jobs before positions are created. Positions are created as employees are hired and multiple vacancies may be represented under the same job posting. Vacant positions on the Job Management model do not appear on an Org Chart.

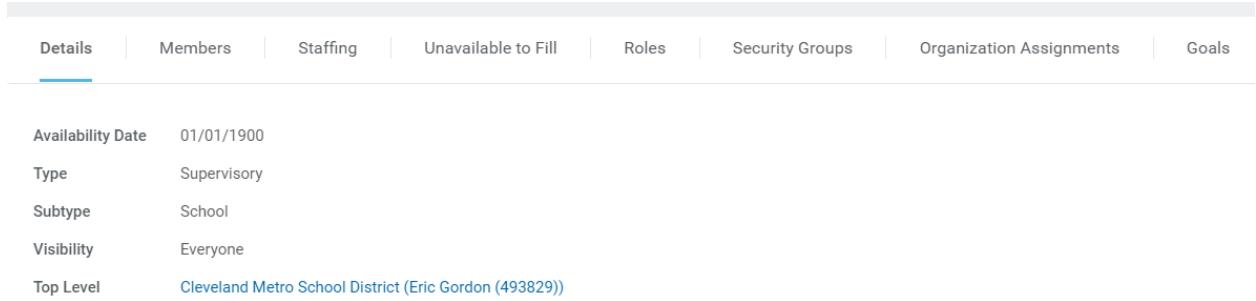
The flow chart below shows the hiring process for existing positions.



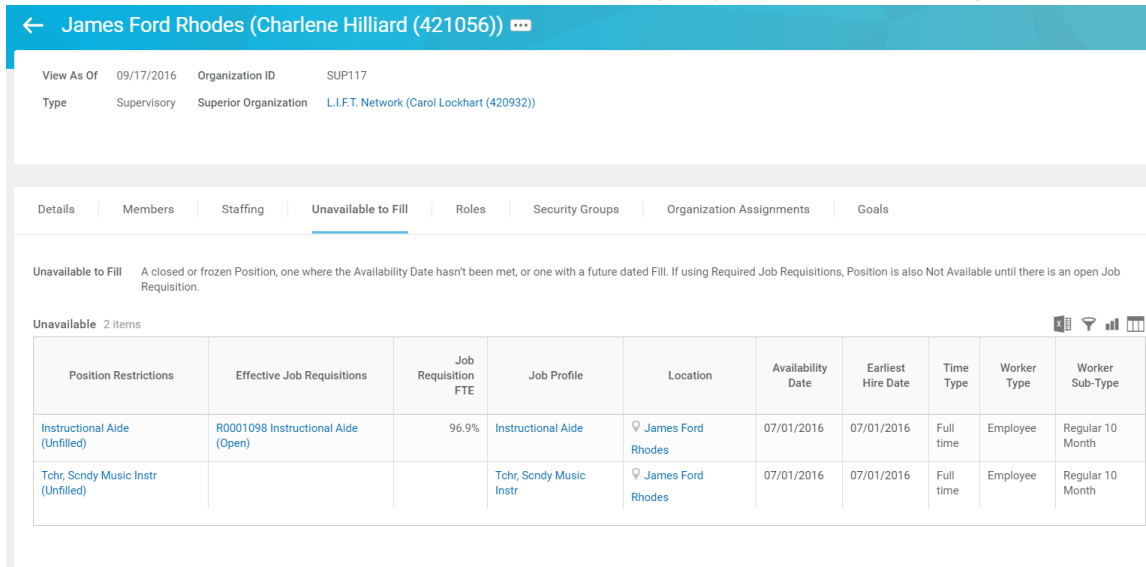


Managers may view open positions and create requisitions from the My Team Worklet. Follow these steps to create a job requisition from the My Team worklet:

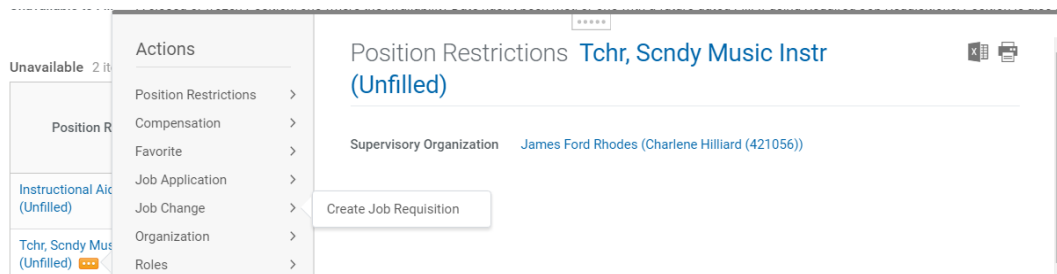
1. Under View select **Organization**. You will see a screen that looks like this:



2. Click on the Unavailable to Fill tab to see open positions without requisitions.



3. Use the Related Actions button off the position name. Select Job Change then Create Requisition.



## ACTIVITY

- View open positions in your organization.

## MANAGE EMPLOYEE JOB CHANGES

### OVERVIEW

Transfers, promotions, demotions, and terminations are all business processes that you can initiate as a manager. You can also move workers and assign them to differential positions.

Transferring an employee from one supervisory organization to another requires two managers, and potentially different Talent Partners approving the outbound and inbound processes.

The chart below outlines steps to complete common job changes:

Manager Actions for Common Job Changes	
IF you are...	THEN
Promoting an employee	Select the employee > Employee's Related Actions button > Job Change > Promote Employee.  <i>*Note: there must be an open position to promote the employee into</i>
Transferring an employee	Select the employee > Employee's Related Actions button > Job Change > Transfer Employee.  <i>*Note: there must be an open position to transfer the employee into</i>
Terminating an employee	Select the employee > Employee's Related Actions button > Job Change > Terminate Employee.  <i>*Note: indicate what you will do with the vacant position</i>  <i>**Keep in mind that the employee will not appear as terminated in the system until midnight on the termination date you entered.</i>

### PROMOTIONS AND JOB TRANSFERS

If a promotion or other job change is within the same department, it is a one-person task. If it involves a transfer between departments, it is a two-person process.

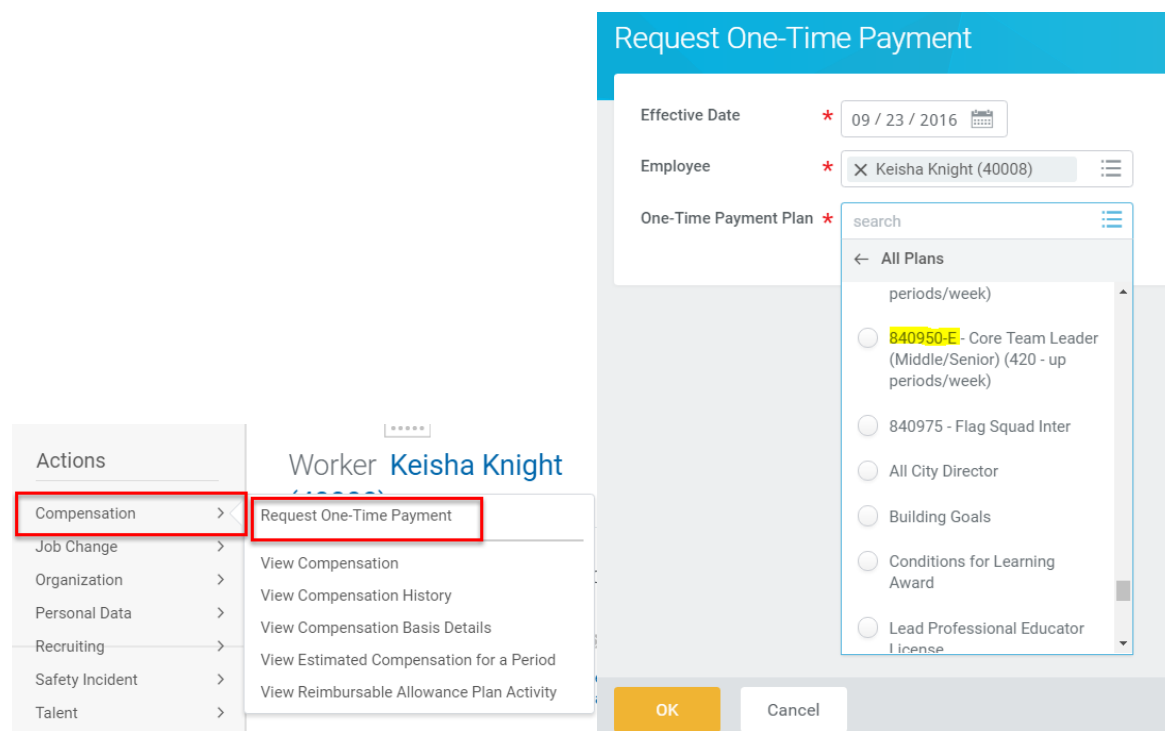
During OPI periods, the manager of the new school initiates the time-stamped job change business process.

## COMPENSATION & ONE-TIME PAYMENTS

One-Time Payments including supplemental pays such as stipends and differentials may be initiated from the employee's Related Actions icon. Workday's automated streamlining eliminates opportunity for lost, misdirected or illegible Employee Request Forms. Workday tracks all approvals, denials and "send-backs." Users can immediately view the status of a requested action.

### REQUEST A ONE-TIME PAYMENT

To request a one-time payment, select One Time Payment from the employee's Related Actions icon. Enter the effective date, the employee and select the One-Time Payment Plan. Differential positions have position codes and are listed first; other supplemental pay options including stipend follow. Note: Athletic-related differential positions will be routed to licensing to verify that the employee holds a Pupil Activity Permit. Compensation will be prorated for coaches who did not hold a Pupil Activity Permit during the entire season.



### ACTIVITY

1. Request a One-Time Payment (from Compensation worklet or from the worker's Related Actions).

## GETTING STARTED AT GO-LIVE

### GO-LIVE ACCESS

When CMSD goes live with Workday, you will access the system from the CMSD Workday Webpage. **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.**

**Workday@CMSD** CLEVELAND METROPOLITAN SCHOOL DISTRICT

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#### Quick Links

- ▶ **Login to Workday@CMSD**
- ▶ Getting Started
  - ▶ Employee
  - ▶ Manager
- ▶ Workday on Mobile
- ▶ Tips & Tricks

#### About Workday

**Workday** unifies financial management, human capital management, payroll, and business intelligence to bring the entire school district together under one modern, agile, easy-to-use application—all delivered in the cloud.

**Workday** Human Resource Management offers intuitive, self-service features to help effectively organize, staff, and pay workforce. Manage the full hire-to-terminate lifecycle in one simple, easy-to-use system. Workday Financial Management unified applications include a full range of finance and accounting capabilities, real-time business insights, and fully auditable process management.

With **Workday**, K-12 systems gain:

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
- Check your photo
- Validate info on your position title and your org structure

*Not correct? Use **“Contact Us”** to let us know!*

#### Ongoing

- Enter and submit your time worked for manager approval
- Approve, send back or correct your team time worked and time off requests
- Hire employees and initiate job changes as needed
- Use dashboards and reports

## RESOURCES AND OTHER HELPS

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

Join Manager User Group that meet every other Thursday...learn more by clicking the Training Tab.

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

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**Enabling Effective, Efficient Education**

**EFFECTIVE**  
Workday will improve accuracy across multiple departments

NOTES



