HR Workday Town Hall

February 21, 2024



HR Workday Town Hall Agenda

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- Welcome
- Onboarding Worklet
- Certifications
- Mid-Year Evaluations
- Workday Insights
- Next Steps/Q&A



Onboarding Worklet

Onboarding Worklet Highlights

- Two different reports:
 - o Staff in the recruitment process
 - o Contingent workers and direct hires
- To be in recruitment report, individual must be in either Offer, Background or Ready for Hire status and will remain on the report until all onboarding processes are completed.
- The following roles can access the report through the Manager Hub:
 - Manager
 - o HCM Business Manager
 - o HCM Business Assistant
- Some items can be skipped by the employee (Photo Change, Passport of Visa Change) which removes the item from their inbox and the report.



Certifications

Certifications in Workday

- Certifications and Licenses are added in Workday by either the employee or the employee's manager.
- When added by the employee, they will enter the Country, Certification Name, and any Attachments to support or provide evidence of the certification or license.
- Manager completes the VUMC source verification process by entering the Certification Number, Issued Date, and Expiration Date from the primary source document, and approves.



Primary Source Verification

STATE OF TENNESSEE DEPARTMENT OF HEALTH DIVISION OF HEALTH LICENSURE AND REGULATION DIVISION OF HEALTH RELATED BOARDS

665 Mainstream Dr. Nashville, TN 37243

tn.gov/health TENNESSEE BOARD OF NURSING 1-800-778-4123 or (615) 532-5166

- To prove continuous licensure, the primary source verification letter for licenses must be pulled before the previous expiration date and uploaded to Workday.
- This can be uploaded by the Manager or the Employee when entering or renewing a license within Workday.
- For Managers, the Manager Hub in Workday will list your staff with licenses expiring in 90 days or less. This is a great source to know which verification letters should be pulled before expiration.
- For licenses in Tennessee, primary source verification letters can be pulled from https://apps.health.tn.gov/Licensure/ default.aspx. For licensure in other states, you can go to the primary verification site for each state.



Renewing Certifications in Workday

- When any changes are made, the employee is required to upload documentation for evidence of the change.
- For licensure, this should be the primary source verification documentation.
- The employee's manager will approve the entry, check the primary source to verify the certification and license information, as well as enter the Certification Number, Issue Date, and Expiration Date.

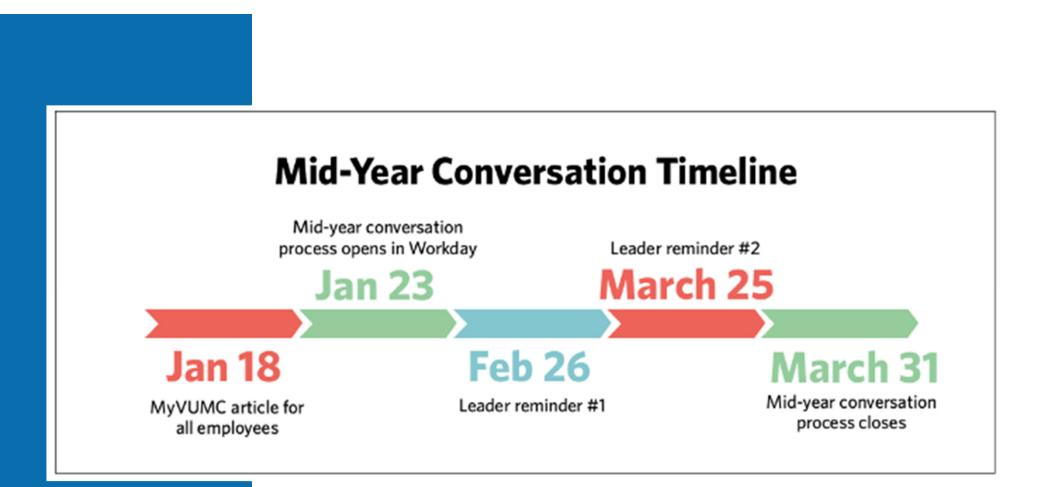


Reminders on Certifications

- New hire licensures must be verified <u>before</u> starting in a licenserequiring role.
- To prove continuous licensure, the verification dates <u>must be before</u> the previous expiration date.
- If the employee completes the Certification Number, the Issue Date, and the Expiration Date and submits the form, a notification will appear in the employee's Inbox. To correct the error, the employee will need to delete the information/certification and resubmit the form again.



Mid-Year Evaluations





New This Year

- Leaders can choose from 5 different mid-year conversation topics:
 - (Topic 1) Check in on an employee/ transferred employee
 - (Topic 2) Discuss development and career opportunities
 - (Topic 3) Job pulse check-in
 - (Topic 4) Check in on employee goal progress
 - o (Topic 5) Other
- Each topic has 3 questions (with follow-up suggestions)



Mid-Year Conversation WD Process

Mid-Year Conversation WD Process				
ww	Manager receives inbox task			
	Mid-Year Conversation			
mat	Employee electronic acknowledgement			
met	Leader electronic acknowledgement			



Responsibilities

Manager Responsibilities	Employee Responsibilities		
Schedule Mid-Year	Participate in the Mid-Year		
Conversation with employee(s)	Conversation with manager		
Complete manager	Complete employee		
acknowledgement	acknowledgement		



Hire date cut off

Employees hired after October 1 will not complete the midyear conversation with their manager.

Instead, they will complete the End of Orientation Evaluation.

When an employee has reached the end of the orientation period (6 months for exempt/90 days for non-exempt) the manager will receive a Workday Inbox task to complete the End of Orientation Manager Evaluation

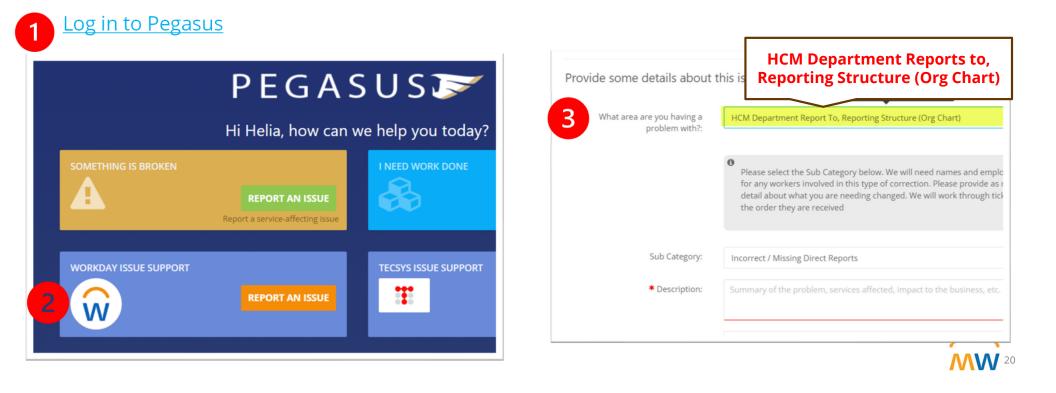


WD Mid-Year Evaluation Support

Reassignment: Wrong Employee

Issue:

• If you receive mid-year evaluations for employees that do not currently report to you, submit a Pegasus Ticket requesting a correction in reporting.



Reassignment: Change in Manager

Issue:

- Manager has changed positions or left the organization, and the mid-year did not automatically go up to the one-up manager
- Evaluation needs to be reassigned

1 Log in to Pegas	this issue.	HCM Performance, Feedback, Goals, Credential			
SOMETHING IS BROKEN	Hi Helia, how can we help you today?			HCM Perfor	rmance, Feedback, Goals, Credentials
	REPORT AN ISSUE	&		SELECT F	ROM THE BELOW:
WORKDAY ISSUE SUPPORT		TECSYS ISSUE SUPPORT	Sub Category:	Talent Prof	ile
2	REPORT AN ISSUE	Ŧ	* Description:	Summary o	f the problem, services affected, impact to the busine

Workday Insights

Searching in Workday

- Use Search Prefix Words followed by a ':'
 - id To search for a specific person or organization
 - > jr Job requisition
 - job Job Profile
 - org Organization
 - rpt Report
- Can find search prefix words by using '?' in global search field
- Results will only return for items you have access to within the system.



WalkMe Menu: Move Location



To move the WalkMe Menu:

- Select the Menu Icon
- Drag and Drop to the new location



Reassigning a Task

- Certain tasks have the option to be reassigned to another worker.
- Reassignment may require an approval, so the reassignment may not happen immediately.
- Before reassigning a task, be sure you know why you have the task. In some cases, you may have it based on the HCM Business Assistant or HCM Business Manager role. You should not reassign these tasks, unless you are sure the manager does not have the task in their inbox.



Future Topics

Next HR Town Hall: Wednesday, March 20, 10:00 am