

HR Workday Town Hall

February 21, 2024



HR Workday Town Hall Agenda

February 21, 2024

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



Onboarding Worklet

Onboarding Worklet Highlights

- Two different reports:
 - Staff in the recruitment process
 - 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
 - HCM Business Manager
 - HCM Business Assistant
- Some items can be skipped by the employee (Photo Change, Passport or 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

- 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.



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

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 before starting in a license-requiring role.
- To prove continuous licensure, the verification dates must be before 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





Mid-Year Conversation Timeline



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
 - (Topic 5) Other
- Each topic has 3 questions (with follow-up suggestions)

Mid-Year Conversation WD Process

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

Responsibilities

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

Hire date cut off

Employees hired after October 1 will not complete the mid-year 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.

1 [Log in to Pegasus](#)



Provide some details about this issue

3 What area are you having a problem with?: HCM Department Report To, Reporting Structure (Org Chart)

HCM Department Reports to, Reporting Structure (Org Chart)

HCM Department Report To, Reporting Structure (Org Chart)

Please select the Sub Category below. We will need names and employee IDs for any workers involved in this type of correction. Please provide as much detail about what you are needing changed. We will work through tickets in the order they are received

Sub Category: Incorrect / Missing Direct Reports

* Description: Summary of the problem, services affected, impact to the business, etc.

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 Pegasus](#)



Provide some details about this issue.

3

What area are you having a problem with?:

HCM Performance, Feedback, Goals, Credentials

HCM Performance, Feedback, Goals, Credentials

SELECT FROM THE BELOW:

Sub Category:

Talent Profile

* Description:

Summary of 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