HR Workday Town Hall
January 23, 2024

HR Workday Town Hall Agenda

January 23, 2024

- Welcome
- Introduction & Overview
- Recruiting & Onboarding
- Other Key Messages
- Next Steps/Q&A

Introduction/Overview

Recruiting & Onboarding

Overview of Recruitment and Onboarding Process

Position
- Existing Position
- Create New Position

Requisition
- Create Requisition
- Candidate Screening and Interview

Candidate Selected
- Offer
- Background Check
- Ready for Hire

Onboarding
- Manager tasks
- Employee tasks

Position

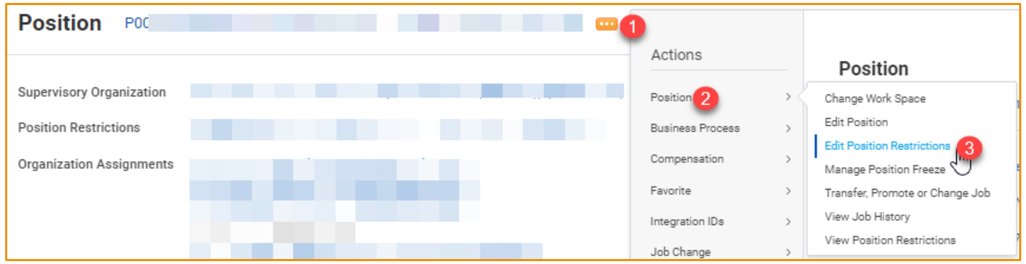
Use Existing Position

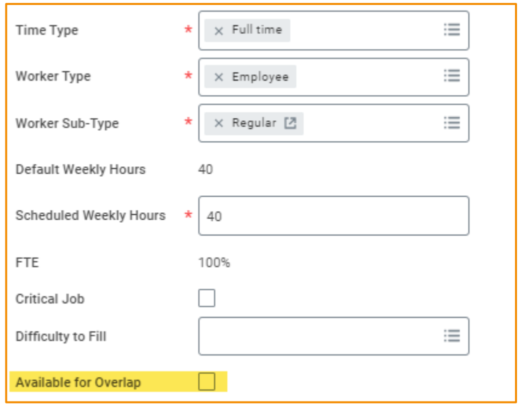
Existing Position

When filling a vacant position or backfilling a position that will become vacant, utilize the same position number when creating a requisition.

- If the position has a current incumbent, update the position restrictions as “Available for Overlap” in Workday, prior to creating a requisition.

Navigate to the Position within Workday. From the related actions tag, select Position and Edit Position Restrictions. Select check box next to “Available for Overlap”





* A transfer or termination transaction will need to be completed for a current incumbent in the position prior to an offer being made for a new incumbent.

Position

Create New Position

Create a new position if you are not filling an existing position within your Supervisory Organization

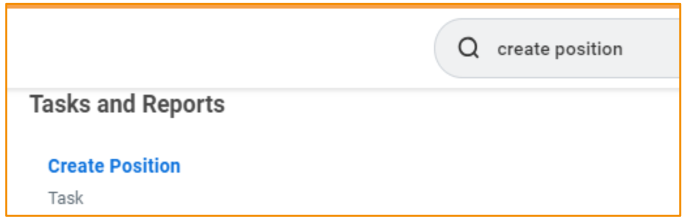
Complete the position creation process within Workday prior to creating a requisition.

- This ensures that a position number has been assigned prior to creating the requisition. Some areas require the position number to be assigned on the requisition before routing for departmental approvals.

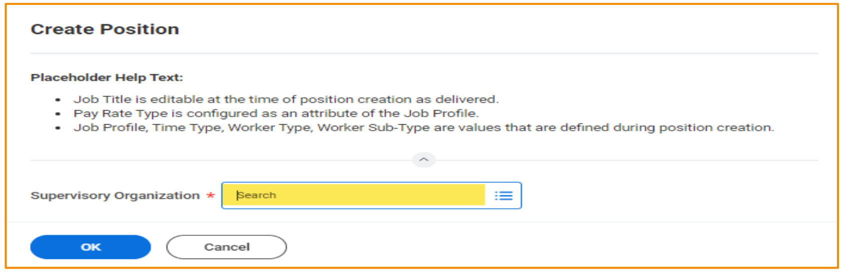
- Create position can be initiated by Manager or HCM Business Assistant roles for the Supervisory Organization.

You can initiate the Create Position tasks through two navigations within Workday.

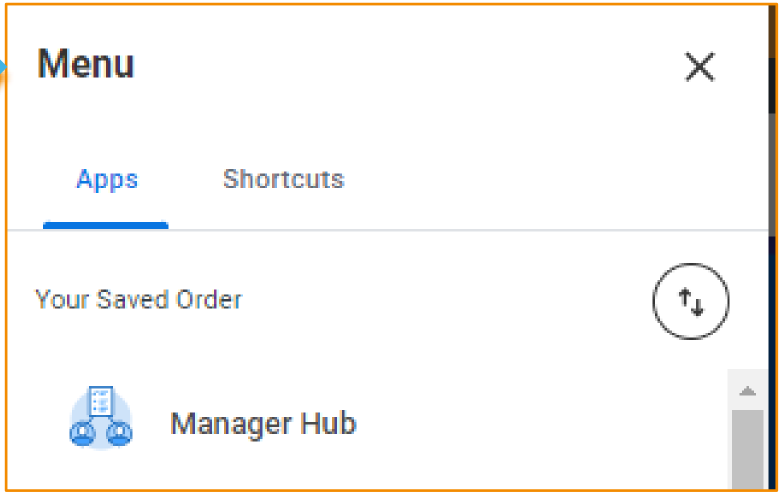
- Search “Create Position” in the search bar and choose the Create Position Task.
- Within the recruiting tab on the Manager Hub, the create position task is on the far right.



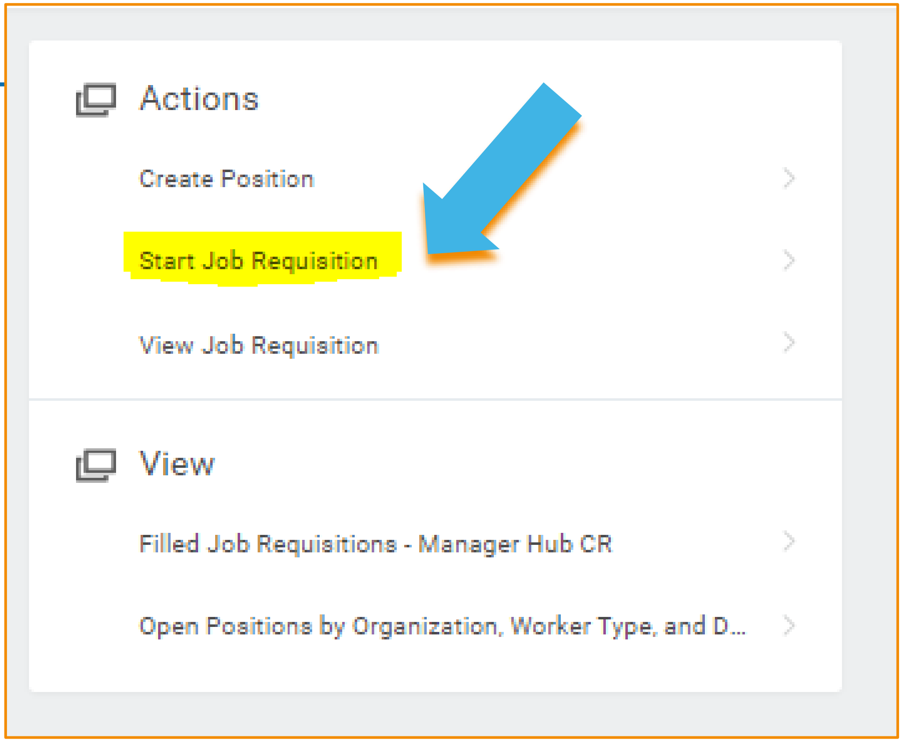
Enter the Supervisory Organization for which the position will reside.



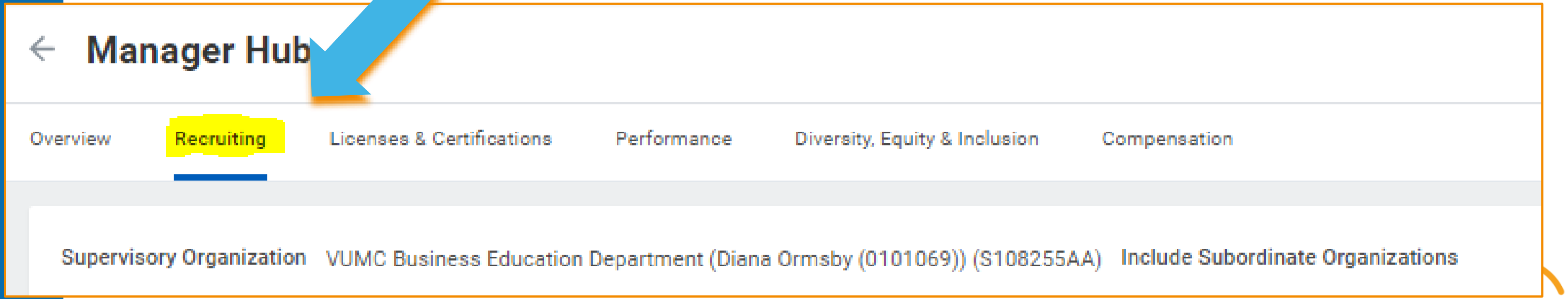
Manager Hub



Menu
Apps
Shortcuts
Your Saved Order
Manager Hub

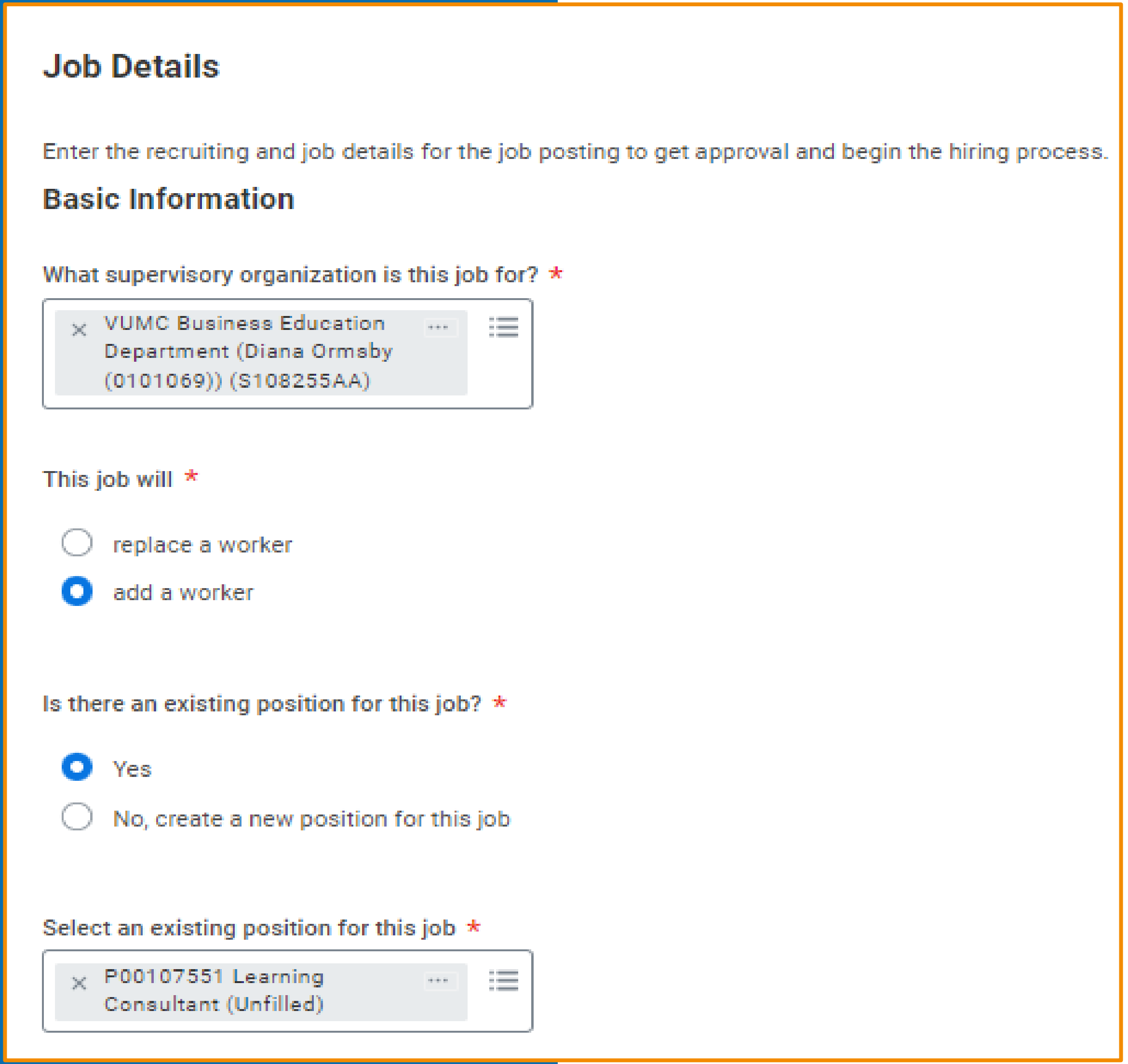


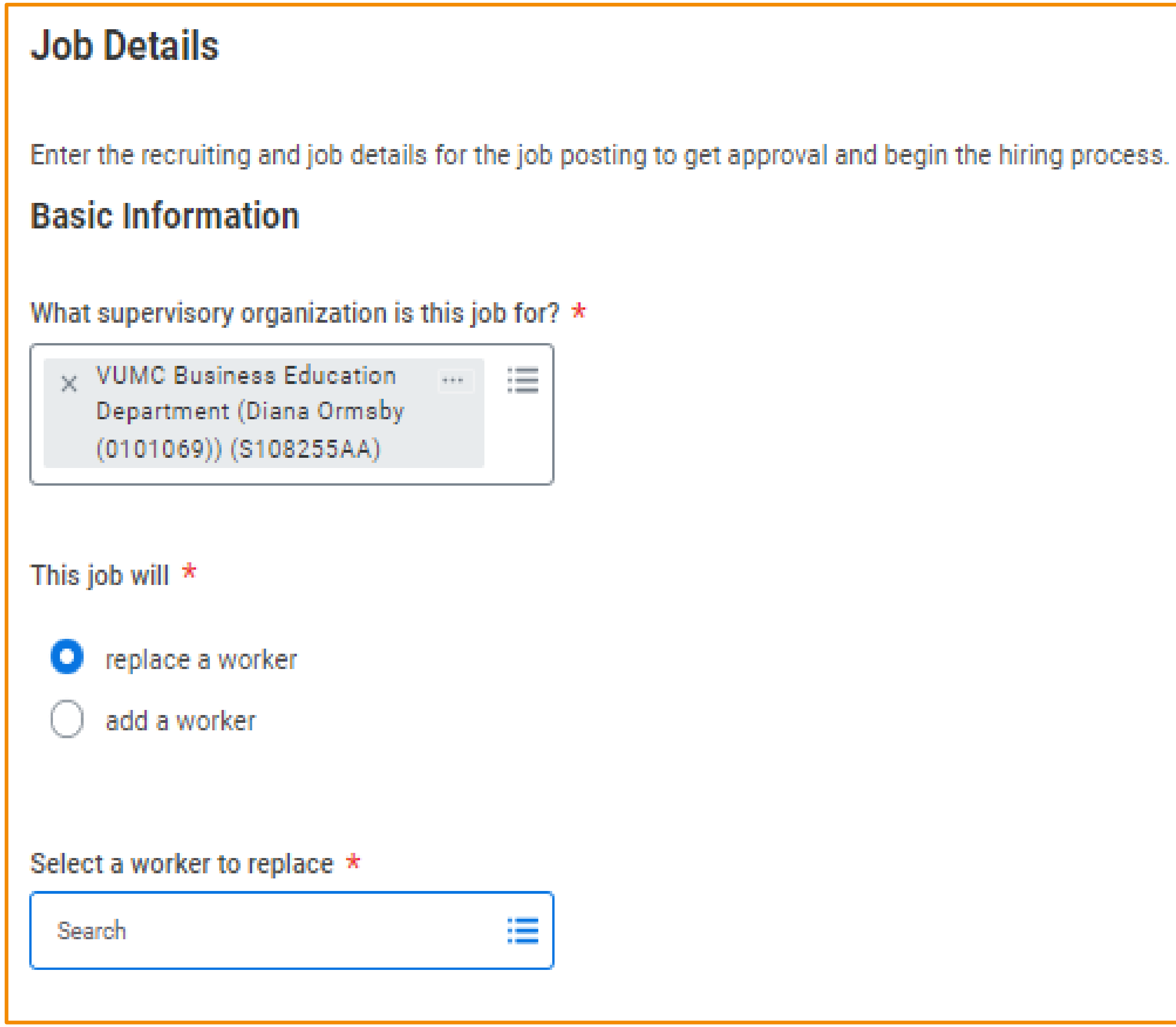
Actions
Create Position
Start Job Requisition
View Job Requisition
View
Filled Job Requisitions - Manager Hub CR
Open Positions by Organization, Worker Type, and D...



Manager Hub
Overview
Recruiting
Licenses & Certifications
Performance
Diversity, Equity & Inclusion
Compensation
Supervisory Organization
VUMC Business Education Department (Diana Ormsby (0101069)) (S108255AA)
Include Subordinate Organizations

Start Job Requisition - New Position Vs. Existing Position





Job Requisition Approvals

- Manager or HCM Business Assistant creates the requisition
- Manager's Manager or HCM Business Manager Approves
- Divisional Approval
- CLC Approval (If required)
- Talent assigns recruiter to requisition to start recruitment process.

Talent Process Steps in Workday

Review

- New applicant
- Have not yet been screened for eligibility, and qualifications
- Recruiter must review prior to hiring manager contacting

Screen

Recruiter Screen

- Recruiter does initial phone screen for basic requirements prior to manager screen

Interview

Interview (Manager)

- Recruiter coordinates with candidate and schedules Interview with Manager via Outlook (linked to hiring managers Outlook calendar
- For best candidate experience, it is important recruiter schedules hiring manager interview

Offer

- Recruiter submits salary recommendation via Workday offer task
- Manager and Managers manager approves Offer task in Workday
- Recruiter sends offer letter to candidate with tentative start date 3 weeks from date of offer
- Candidate signs offer letter via Workday

Background Check

- Recruiter initiates background check process
- Clearance process can take up to 3 weeks
- It is imperative for candidates to complete background check documents timely to expedite process
- All start dates are tentative due to background check process

Ready For Hire

- Recruiter finalizes Talent process
- Candidates will receive email upon being cleared to start
- Candidates must clear by 12pm Thursday prior to orientation to attend.

  This is to ensure candidate has their VUMC ID, I-9 documents, etc.

Inbox Task: Interview Manager

Schedule Interview - R-10179 Manager Learning (Research) (CAND-52379) - R-10179 Manager Learning (Research) (CAND-52379)

Created: 01/19/2024

Jobs Applied to	1	Hiring Manager	Diana Ormsby (0101069)
Action Required	Interview (Manager)	Recruiter	Amanda Rogers (0150617)
Source	Job Search Web Site -> Indeed.com		

1 item

Order	*Interviewer	Interview Date
	Diana Ormsby (0101069)	MM/DD/YYYY

Comment for Interview Team

Submit

Inbox Task: Interview Manager

Rate Interview

Please Do Not add any additional comments in the comment section. Make sure the comments are left blank and only provide a rating using the options available in the rating drop-down. If you have any questions please reach out to you recruiter.

For: R-10179 Manager Learning (Research)

Jobs Applied to	1
Stage	Interview (Manager)
Source	Job Search Web Site -> Indeed.com

Rating: 3 - Highly Recommend

Comment:

Submit

Offer Process

If a position is currently filled, individual in the position must have a termination date or transfer date in the system before the offer can be made or processed in Workday.

Approval of the offer by the Manager and Manager's Manager is required, this approval task includes any one-time payments (sign-on bonus, relocation bonus, etc.) that are part of the offer. (There are no additional departmental approvals.)

Once the offer is approved, it is routed back to the recruiter and the offer letter is generated.

Manager Approval & Offer Acceptance

Candidate **must formally sign the offer letter in Workday** to officially accept the offer and the background steps to be initiated. All offer letters state a **tentative state date** pending clearance.

Manager approval of offer needed before routed to candidate for signature

Total Base Pay Range 33.23 - 41.54 - 49.85 USD Hourly

Totals 1 item

Current		Proposed			
Compensation Basis	Total	Amount Change	Total	Currency	Frequency
Total Base Pay	0.00	42.00	42.00	USD	Hourly

Guidelines 3 items

Plan Type	Current Details	Proposed Changes
Compensation Package		VUMC Compensation Package
Grade		X41
Grade Profile		X41 Hourly

Plan Assignments 4 items

Plan Type	Plan Name	Proposed Change
Hourly	Hourly Plan	42.00 USD Hourly
Dynamic Calculated	LTD Buy Up Calculation (No Pay)	63,360.00 USD Annual Calculated on 02/12/2024
Dynamic Calculated	STD Buy Up Calculation (No Pay)	63,360.00 USD Annual Calculated on 02/12/2024
Merit	Staff Merit Plan	

One-Time Payment

Effective Date 02/12/2024

Submit

Offer Processing

Provide manager and one up sufficient time to approve offers in Workday

Allow recruiters time to verbally extend offer to candidate to ensure best candidate experience.

Present candidate with realistic time to review offer and electronically sign offer in Workday.

*Can extend offers prior to 60 days of start
**Cannot process background prior to 60 days

Background Processing

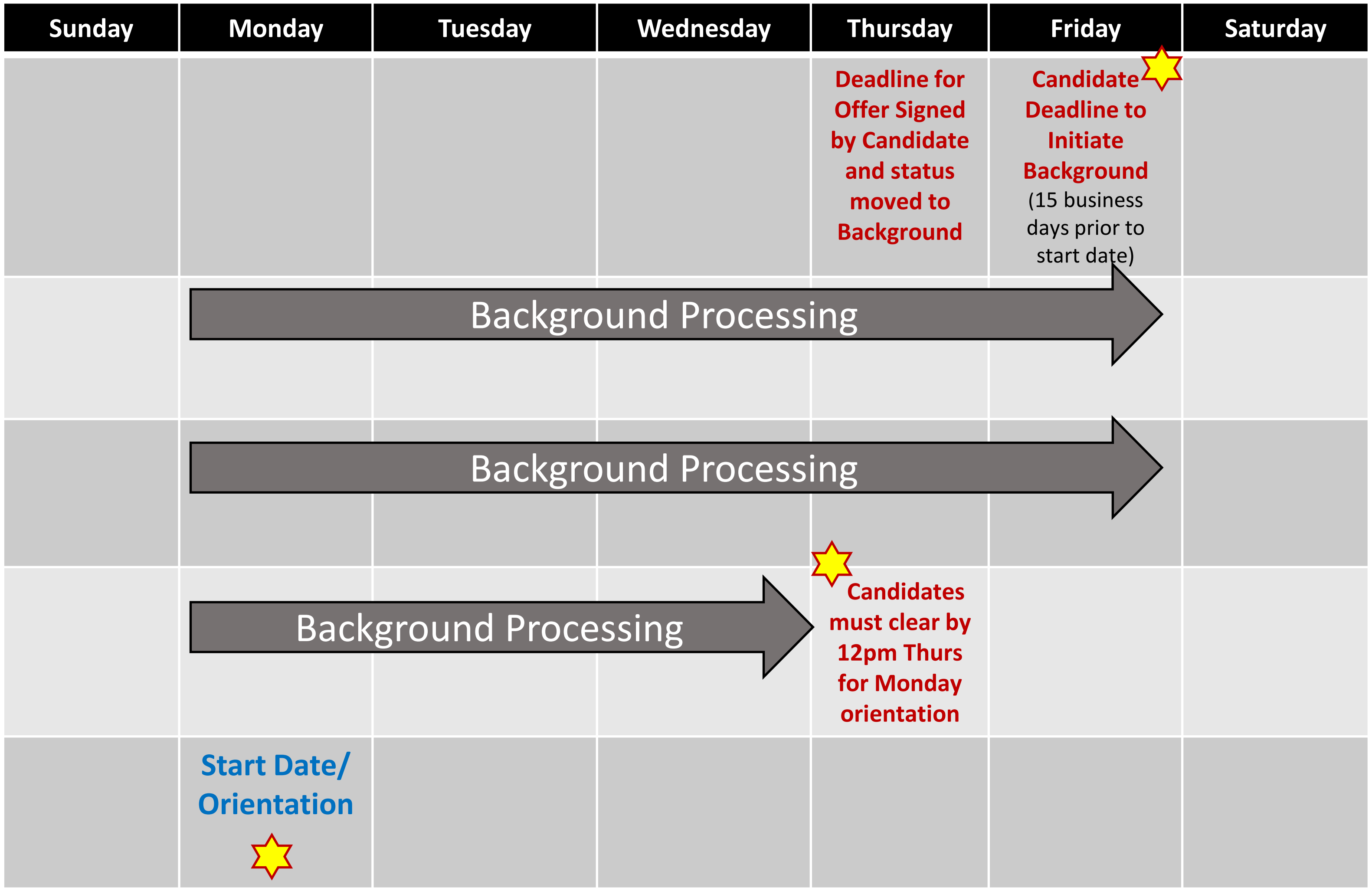
Ensure sufficient time for background team to process and review results.

Allow adequate time for distinctions with state and government clearances, licensure, fingerprint, etc.

Limit Start Date Changes to ensure the best candidate experience.

Internal candidates require two weeks from point of offer to transfer date to allow for transfer processing.

Onboarding Timeline



Background Review/Hire Process Begins

Background Check

- Background results received from vendor
- Onboarding team reviews for clearance
- If background is not approved, recruitment dispositions candidate and reposts requisition.

Ready for Hire

- Recruiter moves candidate to Ready for Hire
- No additional approval/review for manager
- If hire date needs to be changed, recruitment moves candidate back to offer stage to update offer letter and start date.

Hire / Job Change Review

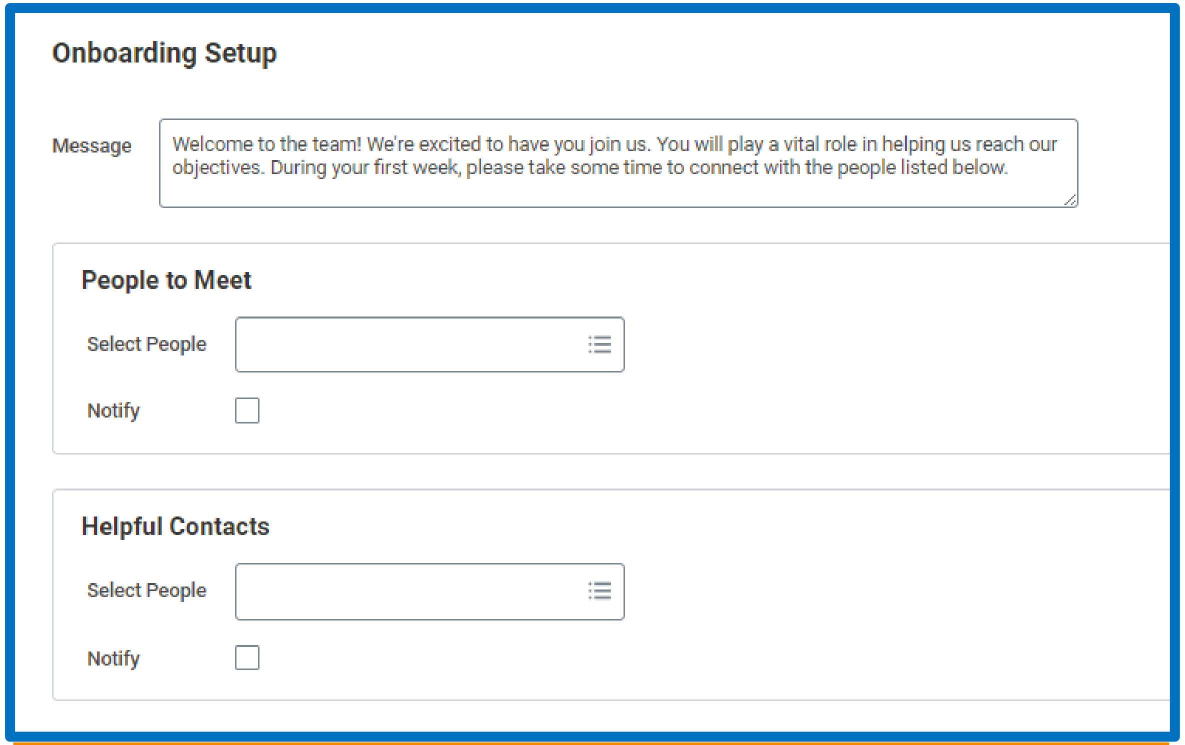
- HCM Data Mgmt Team reviews hire (New Employee) or Job Change (Internal Employee)
- Approval – Candidate moves to Onboarding

Manager Onboarding Tasks

Onboarding Setup

Managers will receive Workday task for Onboarding Setup. This allows the manager to **customize a message** to the new hire and select team members within the organization to meet.

<u>Key step</u> – until this is completed, the employee will not receive some of their onboarding tasks, such as I-9, W-4, etc.



Onboarding Checklist

Manager receives two Onboarding checklists as To Do items in their Workday inbox

<u>Onboarding Checklist 1</u>

Reminders and/or tasks to complete before the new employee's hire date

<u>Onboarding Checklist 2</u>

Reminders and/or tasks to complete on and after employee's first day of work

Employee Onboarding

- Orientation scheduled- Candidate receives email with orientation date/ information (save the date).

- Background review decision – Candidate receives Welcome Letter email confirming background approval. If background is not approved, candidate will receive email notification as not approved and onboarding processes will stop.

- Candidate receives email to claim VUMC ID. May take six hours for VUMC ID to be created after candidate receives email notification.
  - ➢ Candidate can log into Workday once they have claimed their VUMC ID.

- Email with detail for Orientation time sent to candidate Friday before orientation.

- Complete Workday tasks.

Employee Workday Onboarding Tasks

Group One Tasks (Can be completed prior to first day)

- Edit Government ID
- Enter Contact Information
- Enter Personal Information
- Enter Legal Name

Group Two Tasks (Completed no later than Day 1)

- Complete Form I-9 Section one
- Change My Photo
- Changes Self-Identification of Disability
- Changes Veteran Status Identification
- Complete Federal Withholding Elections
- Complete State and Local Withholding Elections
- Manage Payment Elections
- Change Emergency Contacts
- Edits Passports and Visas

Day One Tasks

- Section Two I-9 in person completion (Required completion within first three business days).
- Benefit Elections

Other Key Notes

- Costing allocation task will also be triggered with the hire for the manager to complete.
  - ➢ If this is not needed, you can skip this stop by clicking on the “gear” icon and selecting “Skip This Step”

- Development of an onboarding worklet in progress.

Other Key Messages

Reminders

- Important to process terminations timely (ideally well before the last day), as this allows system notifications and offboarding processes to trigger for the employee.

- When you attach a file to a job transaction for an individual, the individual is able to see the attachment. Please be sure what you are attaching does not contain information about other people, or sensitive information you do not want the employee to see.

- Despite the holiday showing in the absence module, you still must report time for the holiday as PTO. It is NOT automatically processed/paid.

Future Topics

Potential Topics for Future Townhalls

- Contingent Workers
- Supervisory Organizations
- Job Changes
- HR Reporting
- Security Roles
- Employee Performance Evaluations and Goal Setting
- Getting Help for questions (Workday Help vs Pegasus)

Questions?

Next HR Town Hall: February 21 @ 10am