



CBO Meetings
March 15 & 16, 2023

Agenda

- Overview of Role Assignments within Workday
- Specific Role Assignments in Workday for Faculty
 - Employee as Self
 - Manager Role
- Delegation
 - Assignment & Duration
 - Policy

Overview of Role assignments within Workday

*Approximate numbers

Role	Total*	Staff*	Faculty*
Employee As Self	32,000	28,700	3,300
Manager	3,000	2,300	700
Cost Center Manager	653	650	3
Grant Manager	73	70	3
Other Grant Roles	204	204	0
PCard Cardholder	512	500	12
Pcard Manager	290	260	30
T&E Cardholder	465	450	15
Financial Analyst	1,118	1,118	0
Department Accountant	42	42	0
Tecsys: Inpatient	5,200	5,200	0
Tecsys: CDUI	1,200	1,200	0

Role assignments within Workday for Faculty

- Employee as Self – Approximately 3,300
- Workday Manager (People Leader) - Approximately 700
 - Assigned only to those faculty with direct reports in their supervisory organizations
- Cost Center Manager – 3
- Grant Manager - 3
- Cardholder/Cardholder Manager – Approximately 50

Employee As Self

- View paycheck information
- Update your address information
- Complete Direct Deposition information
- Enroll in benefits
- Request PTO/Time Off (as staff)
- Expense Reporting



Workday Manager Role

Tasks only a manager can do

- Viewing information of direct reports
- Reviewing and approving time off requests
- Initiate job requisitions
- Assess candidates
- Initiate job changes, such as reclassification; standard hours change
- Initiate pay rate changes
- Initiate hiring process
- Terminations
- Performance Evaluations and Goals
- Disciplinary Actions
- Position creation
- Expense Report Approval
- Additional Pay, such as one-time payments and allowance plans

Manager Role Tasks that can also be initiated by (other Finance security roles)

- Accounting Adjustment Event
- Accounting Journal Event
- Assign Costing Allocations

Manager Role Tasks that can be initiated by employee

- Manage employee information, such as: Awards & Activities; Education; Job History; Languages; Professional Affiliations; Work Experience

Delegation

Approval not required



With one-up Manager
Approval

- Delegation is the **temporary** assignment of another person to act on your behalf to carry out specific activities.
- Delegation is intended for a short-term period, such as PTO or a Leave of Absence and should not exceed 16 weeks.
- Delegation allows the delegate security to complete tasks on behalf of the delegator.
- A delegation can be made to a manager or peer within an employee's supervisor organization with no approvals.
- A delegation can be made to a subordinate with one-up manager approval

Delegation (continued)

- The following items should be done by the manager and not delegated:
 - Disciplinary Action
 - Performance Improvement Plan
 - Performance Evaluation
- The above items may be delegated if the manager is out on an extended leave of absence.

Delegation - Department Chair

- Only the highest-level faculty department leader who is typically the department chair*, by exception to policy, may delegate for longer periods of time to a selected designee.
- These requests must be approved by the COO, CFO or CHRO.

*For the Section of Surgical Sciences this individual is the person who is the Head of the Section.



Post Go Live Considerations

New security role assigned only to CBOs at the highest level (equivalent to the department chair):

- Allow VIEW only access to the same items as Workday Manager role.
- Provide ability to run reports on the supervisory organizations.
- This role may not be delegated.