Workday Training for Managers

Workday Foundation
Access & Login
Basic Navigation
Personal Information
My Team
Delegation
Reminder…

• Please put your phone on mute.
• Please do not put your phone on hold.
• Phone lines will be muted, use the “raised hand” feature if you have a question AND unmute your phone line (#6)
• Also submit questions and comments at any time via the CHAT function.
Reflection

Lord,

I feel so busy lately, I pray you’ll help me remember what matters most in the midst of all I have to do.

Give me eyes that see the needs of those around me.
Give me ears that hear the meaning behind the works.
Give me hands that reach out to make a difference.
Give me a heart that beats in tune with Yours rather than with the clock on the wall.
Remind me often that time is intended to be given not spent.
And even in the midst of all my busyness, may I truly be about Your business.
Amen.
## Agenda

- Welcome & Introductions
- Workday Foundational Information
- Workday Access & Log In
- Basic Navigation
- The Workday Help Site
- Workday Security Roles
- Viewing & Changing Your Personal Information
- Change Benefits
- My Team Worklet
- Delegating
Purpose & Objectives

Purpose/Goal of this session:
• Prepare you to be able to use the Workday system

Objectives: At the end of this session, you will be able to:
• Explain Workday foundational information (e.g., what is Workday, security role definitions, key Workday decisions etc.)
• Perform basic navigation tasks in Workday
• View and change your personal information
• Navigate through the My Team worklet
• Delegate your Workday tasks
Welcome & Workday
Foundation Information

<Put Leader’s Name Here>
TODAY: Our State of HR/Payroll Technology

Trinity Health HR/Payroll Information Systems - Current State

Talent Management & Learning
- Action Pro
- SD PeopleFluent
- Chicago Healthcare Council
- Position Manager 10.5
- HealthStream
- Skill Survey
- SYNG
- PeopleSoft 9.0
- SuccessFactors
- Centrify

Compensation
- MarketPay
- PCE
- Retirement
- MarketPay, ARCO, ACG CRM
- Default Data Warehouse

Benefits & Healthcare
- Medicare
- Commercial
- Express Scripts
- United Health Care
- Aetna
- ValueHealth

Human Resources
- Lawson 9.0.1
- PeopleSoft 9.1
- SMS AS400
- ADP
- Reporting

Local Databases
- Loyola Disc, Pen, Job
- St. Joseph IN
- Time & Attendance Scheduling
- Grand Rapids New Hires
- Ann Arbor EE Database
- Fresno Database
- Executive Database
- Lawson

Time & Attendance Scheduling
- Kronos
- API
- TimeTrak
- One Shift
- Horison
- Personify
- Workforce Manager

Additional Databases
- Concur Interface?
- Miscellaneous
- Active Directory
- Systems (LDI)
- Legacy Systems (LDI)
- Other?
- STAR

Miscellaneous
- LiquidWEB (Forms)
- MLICare

Manager
- Manager Access
- Location Dependent

Associate
- Associate Info
- Position Manager 10.5
- PeopleSoft 9.0
- One Shift

Concurrent Employee
- Non-Union
- Personnel
- Towers Watson
- CIGNA
- United Health Care
- Aetna
- Express Scripts
- ValueHealth

Blue Cross Blue Shield
- Health Choices
- HAP
- Advantage Health
- ValueHealth
- Priority Health
- Aetna

Blue Cross Blue Shield
- Health Choices
- HAP
- Advantage Health
- ValueHealth
- Priority Health
- Aetna
What is Workday?

• More than just a HR/Payroll system
  • A system designed and built with the manager and employee in mind
• Singular sign-on for Manager Self Service and Employee Self Service
• Mobile access
• Real-time (i.e., can post a position when one is vacated)
Workday Supports our People-Centered 2020 Strategy To…

- Deliver operational excellence
- Effectively steward our resources
- Engage our colleagues
Benefits of Implementing Workday

- Consistent colleague experience
- Consistent reporting (e.g. “How many employed physicians do we have?”)
- Collaboration, best practices, consistent compliance
- Common governance to maintain simplification
- Consistent accounting methods and general ledger account assignment
- Consistent definition of taxable/non-taxable, retirement eligible, productive/non-productive hours
- Consistent and improved colleague communication
- Mobile device integration
- Improved and consistent recruitment and development processes
- **Replaces the PAF (Personal Action Form) for Managers**
Workday – Key Facts

- First phase of 5-year Transforming Operations plan for HR
- Replaces all major HR and Payroll systems
- Cloud-based, simple to use, visually appealing application
- Will not replace our time and attendance systems (e.g., Kronos and API) or our learning managements system (HealthStream)
Key Decisions

Related to:
- Organizational Types & Descriptions
- Business Processes
- Manager’s Role
A Key Decision: Organization Types

- An organization refers to a grouping used to organize:
  - People
  - Resources
  - Workers
  - Other organizations

- Organizations provide management, visibility into, and reporting (roll-up) structures for resource allocation
Organization Types

- HR Organizations
  - Supervisory
  - Matrix
  - Retirees
- Costing Organizations
  - Company & Company Hierarchy
  - Location & Location Hierarchy
  - Region & Region Hierarchy
- Custom Organizations
  - Custom (e.g., grandfathered benefits group, etc.)
- Payroll Organizations
  - Paygroup
  - Payroll Company
- “Light” Organizations
  - Union
  - Talent Pool
Supervisory Organizations (SUPV ORG)

- A Supervisory Organization is the manager hierarchy within Trinity Health
- Each person who has colleagues reporting to him/her represents a SUPV ORG
- Colleagues or “workers” are members of their people manager’s SUPV ORG
A Key Decision: Roles Assigned at Supervisory Organization

- Supervisory Organizations roll up to one another to form the Supervisory Organization Hierarchy

- A **Manager** is assigned to a Supervisory Organization

- Employees are “members” of a Supervisory Organization
A Business Process Defines Who, What & When

- **WHO** can initiate a business process?
- **WHAT** tasks need to be completed?
- **WHO** needs to do those tasks?
- **WHEN** do those tasks need to be completed?
- **WHO** needs to know that a change occurred?
Key Business Processes with Manager Involvement..

...designed to assist managers with their staff-related actions

- Pre-hiring, hiring and onboarding
- Changing an employee’s job
- Delegating tasks
- Ending an employee’s additional job
- Ending a non-employee contract
- Requesting a compensation change (with the exception of merits)
- Terminating an employee
The Manager’s Role

• Performs actions on members of assigned supervisory organizations
The Manager’s Role

• The Talent Acquisition process:
  • Create and edit job requisitions
  • Schedule interviews
  • Provide feedback on candidates
  • Complete interview evaluations on candidates
Workday Security Roles
Security Roles: Basic Building Blocks for Our Business Processes & Security

Security Roles:
• Determine what a person can see and do in Workday regarding the business processes.
• Think of your security role as a hat you wear.

Security Roles are NOT:
• Job titles or job definitions.
Manager Security Role Description

- Manager: views and performs actions on members of assigned supervisory organization.
  - Examples include:
    - Compensation changes
    - Job changes
    - Performance reviews, staffing, recruiting (Phase 2)
    - Terminations
Other Security Roles in Workday

Business processes initiated by managers will flow to and from some of these security roles:

- Benefit Partner
- Employee As Self
- HR Leader
- HR Partner
- HR Representative
- HR Shared Services
- Payroll Partner
- PTO/Time Off Partner
- Recruiter
Workday Access

Logging Into Workday

Basic Navigation
Important Note!

• You need **Internet Explorer 9 or higher** installed on your laptop or PC (for work and home PCs)

• Please work with your IT department to have it upgraded

• Please initiate this request as soon as possible
Options to Access Workday

1. From our Workday Resources portal ([http://workday.trinity-health.org](http://workday.trinity-health.org)) click the Manager/Exec link

2. From anywhere you have internet access
Log in directly at: www.myworkday.com/trinityhealth

3. From your mobile device
Download the Workday app from the iTunes or Google Play store; on your first login:
   - Type trinityhealth as your Tenant
   - Click Get Started!

HINT: Bookmark the website on your internet browser for easier future access.
Log In to Workday

TO LOG IN:
Use your active directory (network) ID and password.

ON YOUR FIRST VISIT:
Workday highlights three of the main items you can use to navigate the site.
Click “Let’s get started” to begin.

For help with your password, contact your Tier 1 resource as noted on the Workday website.
Workday Mobile App

Before you can begin to use Workday on your iPhone, you must download the Workday app.

1. Find and click the Apple App Store icon on your iPhone.

2. In the search field, type Workday. As you begin to type, apps display on the screen.

3. When the Workday app displays, tap Open. The app will begin to download on your iPhone.
Mobile Sign In & Access

4 When the Workday app downloads to your phone, the Workday screen displays.

5 Type TrinityHealth (one word) in the Tenant field and click Get Started!
The Sign In page displays.

Your "tenant" is your company’s unique identifier at Workday. If you also access Workday through a Web browser, it is the word immediately after https://www.myworkday.com/ in the address bar, up to but not including the slash.
Mobile Sign In & Access

To sign in, type your active directory (network) **User Name** and **Password**.

**ON YOUR FIRST VISIT:**
Workday highlights three of the main items you can use to navigate the site. Click “Let’s get started” to begin.
Basic Navigation — Home Screen

HOME BUTTON
SEARCH BOX

PROFILE
- View your profile
- Access your Inbox, Notifications, or Favorites
- Click My Account to update your password or preferences

ABOUT THE WORKLETS

Inbox
Get alerts when you need to take action — or notifications when something is complete

Personal Information
Change your information, such as preferred name, home address, and emergency contact

Pay
View payslips; view or change your direct deposit information

Benefits
View or change your benefits information, including beneficiaries

Directory
View colleagues’ phone numbers, etc.
Basic Navigation — Common Icons

Understand what these icons mean to move around Workday quickly and easily

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>Click to add or change information.</td>
</tr>
<tr>
<td>Gear</td>
<td>Click to customize your Workday landing page or view options for that page.</td>
</tr>
<tr>
<td>Home</td>
<td>Click to return to your home page.</td>
</tr>
<tr>
<td>Prompt</td>
<td>Click to expand a box that will contain a list of options.</td>
</tr>
<tr>
<td>Red Asterisk</td>
<td>Indicates a required field <em>(you must provide information).</em></td>
</tr>
<tr>
<td>Related Actions</td>
<td>Click to view a list of actions you can take.</td>
</tr>
<tr>
<td>Search</td>
<td>Quickly search for people and tasks.</td>
</tr>
<tr>
<td>Worklet</td>
<td>Starting place for you to view information and initiate tasks. <em>(Workday terminology)</em></td>
</tr>
</tbody>
</table>
Workday Support

- Workday login issues: Contact the Service Desk at 734-343-3003
Personal Information Worklet
Log in to Workday and click the Personal Information worklet.

**NOTE:** You may need to provide proof of change.

**VIEW**
Click an item to view your personal information.

**HINT:** Click More for additional Views.
Contact Information Change

1. Click **Edit**

2. Click the **edit icon** or **Add** to make changes to your personal or business:
   - Address
   - Phone
   - Email
   - Instant Messenger
   - Web Address

3. Click **Submit** when complete; then click **Done**
Personal Information Change

1. Click the **edit icon** to add/change your:
   - Gender
   - Date of Birth
   - Marital Status
   - Race/Ethnicity
   - Citizenship Status
   - Disability
   - Military Service

2. Click **Submit** when complete; then click **Done**

**HINT:** Click the **prompt icon** for a menu of options and the **checkmark icon** to accept changes

Your personal information change request will be forwarded to HR for approval and processing
Emergency Contacts Change

1. Click **Edit**

2. Click the **edit icon** to change the following information for your emergency contact (* indicates required information):
   - Legal Name *
   - Relationship *
   - Preferred Language
   - Address
   - Phone
   - Email
   - Instant Messenger
   - Web Address

3. To add an alternate emergency contact, scroll down and click **Add**

4. Click **Submit** when complete; then click **Done**

**HINT:** Click the **prompt icon** for a menu of options and the **checkmark icon** to accept changes

**NOTE:** You must provide at least one form of contact information (e.g., phone, email).
Photo

1. Click **Select files** to upload a picture
2. Drag the circle to center over the part of the picture you want
3. Click and drag a corner to make the circle smaller or larger
4. Click **OK**

5. Click **Submit** when complete; then click **Done**

Your photo request will be forwarded to your Manager for approval

**NOTE:** Photo Guidelines:
- An individual head shot - shoulders and above
- Clear, of good quality
- Appropriate business/business casual attire
- Caricatures, group, vacation, sports/hobby photos, etc., DO NOT meet guidelines.
- Requires manager approval
- Photos should be Jpeg (.JPG) files
- Workday allows you to crop photos that you upload. However, when the photo is transferred to Outlook, the application only recognizes the source file. If you upload a group photo, for example, that is what will appear in Outlook, even if you crop it in Workday.
Legal Name Change

1. Make changes, as appropriate (* indicates required information)

2. Type any comments

3. Click **Select files** to upload required documentation (e.g., marriage license, divorce decree)

4. Your legal name change request will be forwarded to HR for approval and processing

5. Click **Submit** when complete; then click **Done**

**NOTE:** You must provide proof of name change.

**HINT:** Click **Upload** to add more documents

**Add a description and choose Legal Name Change from the category list**

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Preferred Name Change

1. Uncheck the box to make edits to your preferred name
2. Make changes, as appropriate (*indicates required information)
3. Type any comments and click Submit
4. Click Done

NOTE: Your preferred name must go through approval.
Benefits Worklet
Benefits Worklet

- Use this worklet to:
  - Change your benefits due to a life event
  - Add dependents
  - Add/change beneficiaries
  - View benefits

Note: You may be required to provide documentation for additions/changes
Benefits Worklet

Log in to Workday and click the **Benefits** worklet

Click the item you wish to change/view — see the following pages for further instructions on:

- **Page 3**: Change Benefits
- **Page 5**: Add Dependents
- **Page 12**: Add/Change Beneficiaries
- **Page 13**: View Benefits and Current Cost

**NOTE:** You may be required to provide documentation for additions/changes.

**HINT:** Click the link on the Retirement Savings page to be redirected to Transamerica’s website ([www.traretire.com](http://www.traretire.com)).
Change Benefits

1. Click the appropriate Benefit Event Type
2. Type the Benefit Event Date
3. Based on the information added above, these will auto-populate
4. Click the add icon to upload required documentation (e.g., a marriage license or birth certificate)
5. Type any comments and click Submit
6. Next, you will choose/update your benefit elections; click Open

To learn what documentation is required, go to http://mybenefits.trinity-health.org
Change Benefits

7. Your current **Health Care Elections** will appear; make your changes as shown below.

Please submit a proof of birth/adoption before submitting your new elections.

8. Repeat steps above for each health care election shown; then click **Continue**.

To learn more about your benefit options, go to [http://mybenefits.trinity-health.org](http://mybenefits.trinity-health.org).
Change Benefits — Add Dependents

From the Add My Dependent From Enrollment option, complete these steps:

1. Click Yes or No to answer the question; then click OK

2. Complete the Add My Dependent form; the following information will be required (* indicates menu options are available):
   - First Name
   - Last Name
   - Relationship
   - Date of Birth
   - Gender
   - National ID

3. Click OK
Change Benefits

9. Your current **Spending Account Elections** will appear; make your changes as shown below.

![Change Benefit Elections](image)

- **Click **Elect** or **Waive**
- **HINT:** Click the **Go Back** button at the bottom of the screen to revisit prior election pages.

10. Repeat steps above for each spending account election shown; then click **Continue**.
Change Benefits

11. Your current **Insurance Elections** will appear; make your changes as shown below

12. Repeat steps above for each insurance election shown; then click **Continue**
Change Benefits

13. Your current Beneficiary Designations will appear; make your changes as shown below

Click the add icon to add a beneficiary or click the remove icon to remove a current beneficiary listed

Click the prompt icon to choose a beneficiary from your dependents

Update the percentage amounts (percent of benefit the beneficiary will receive)

14. Repeat steps above for each benefit plan shown; then click Continue
15. Your current **Additional Benefits Elections** will appear; make your changes as shown below.

16. Repeat steps above for each additional benefit election shown; then click **Continue**.
Change Benefits

17. Review your Elected Coverages

Please submit a proof of birth/adoption before submitting your new elections.

Elected Coverages

18. Scroll down and click the arrow icon to see details for Waived Coverages and Beneficiary Designations

19. Review the Electronic Signature agreement and click I Agree

20. Type any comments and click Submit
## Change Benefits

21. Click **Print** at the bottom of the page to print your Elections Confirmation page — you will have the option to open or save a pdf document.

22. Click **Done**

---

Your benefit elections will be forwarded to HR for approval.

Once your benefit elections are approved, your Current Cost will be updated on the main Benefits worklet page.

![Current Cost](image)

**HINT:** Click these icons to export to Excel, filter results, expand/collapse chart, or show/hide columns.

---

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>Coverage Begin Date</th>
<th>Deduction Begin Date</th>
<th>Coverage</th>
<th>Calculated Coverage</th>
<th>Dependents</th>
<th>Benefits</th>
<th>Employee Cost (Bi-weekly)</th>
<th>Employer Contribution (Bi-weekly)</th>
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<tbody>
<tr>
<td>Blue Cross - Blue Shield</td>
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<td>04/01/2016</td>
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<td>04/02/2016</td>
<td>EE + Spouse</td>
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<td>Mary Colleague3</td>
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<td>04/16/2016</td>
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<td></td>
<td></td>
<td></td>
<td>$100.00</td>
<td></td>
</tr>
<tr>
<td>Basic Life and AD&amp;D - The Hartford Basic Life and AD&amp;D To Salary (Employee)</td>
<td>04/01/2016</td>
<td>04/02/2016</td>
<td>1X Salary</td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>$2.49</td>
</tr>
</tbody>
</table>
Add/Change Beneficiaries

1. Click **Beneficiaries** from the Benefits worklet

2. Click **Add** to add a new beneficiary OR Click **Edit** to change the beneficiary’s information

Click your option; then click **OK**

The following information will be requested if you choose New (* indicates item is required)

**New Person**
- Legal Name*
- Relationship*
- Date of Birth
- Gender
- Contact Information
- Identifier Information

**New Trust**
- Trust Name*
- Trust ID
- Trust Date
- Beneficiary Trustee Names
- Contact Information

3. After adding/changing beneficiary information, click **Submit**

To update your beneficiary(ies) for your 403(b)/401(k) Plan, go to www.ta-retirement.com.
View Benefits and Current Cost

**CURRENT COST**
Total amount deducted from each paycheck for elected benefits

**BENEFIT ELECTIONS**
View the benefits you are enrolled in

**BENEFIT ELECTIONS AS OF DATE**
View the benefits you were enrolled in during a previous benefit period (not available for periods before Workday go live)
Direct Access Users

No Approval Needed (by HR/HR Reps, Service Center, Management)

- Address Change – unless a geographical change which results in a health plan change
- Beneficiary designation
- Personal data change
- Personal Contact Information (address/phone/personal email)
- Work contact information (phone, address, email)

Approval Needed (by HR/HR Reps, Service Center, Management)

- Personal Data (Gender, DOB, marital status, place of birth, race/ethnicity, citizenship)
- Photo
- Edit government ID
- Edit passport/visas
- Edit licenses/certifications
- Edit other ID
My Team Worklet
My Team Worklet

**MY TEAM**
Access information you can view or take action on for your team members. See following pages for more information.

**BIRTHDAYS**
Get notified when a team member’s birthday is coming within the next two weeks.

**ANNIVERSARIES**
Get notified when a team member’s work anniversary is coming within the next two weeks.

A number indicates you have a notice.
My Team Worklet (cont’d)

View information about your team and take actions available to you based on your level of security access, including:

### VIEW
- My Org Chart
- Timeline
- Headcount
- Organization Directory
- My Leadership Roles
- Organization
- Organizations I Belong To
- Org Charts
- Compare Team
- Location Directory
- All Locations
- Active Employees
- FTE Report
- My Management
- Management Hierarchy
- Management Chain
- Job Family
- Job Profile
- Matrix Assignments
- Matrix Organization
- Membership Rule
- Part-Time Workers
- Positions & FTE
- Emergency Contacts for Worker
- Development Items
- Time Off and Leave Calendar

### ACTIONS
- Terminate
- Business Title Change
- Add Job
- End Additional Job
- Change Organizations

View your individual team members
My Team (View>My Org Chart)

- **SCROLL**
  Click to see organizational chart above this role (who the colleague reports to)

- **PRINT**
  Workday tracks our colleagues and organizations in real time; however, you have the option to print

- **SHORTCUT**
  Hover over dots to see managers above and click to their team

- **FILTER**
  Add or remove non-employees or open positions from this view

- **HEADCOUNT**
  See a colleague’s number of direct reports

- **COLLEAGUE ORG CHART**
  Click this arrow to see a colleague’s direct reports

- **RELATED ACTIONS**
  (“BRICK”)
  Click to view a list of actions you can take

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My Team — View Team Member

From the My Team or My Org Chart screen, click the name of the team member

Related Actions (“Brick”) Click to view a list of actions you can take

INSIDE THE MENUS

Inbox
- Job Details
- All Jobs
- Manager History
- Management Chain
- Organizations
- Support Roles
- Worker History

Contact
- Contact Information
- Emergency Contacts

Career
- Certifications
- Education

Overview
- Job History
- Education
- Skills
- Projects
- Give Feedback
- Employee History (Job Profile/Compensation)

Compensation
- Totals
- Compensation Package
- Grade
- Grade Profile
- Company

Time Off
- Time Off Balance
Delegation
Delegation

• Use this process to:
  • Delegate your Workday activities/tasks while you are away
  • Update/remove delegation rights
  • Manage tasks that are delegated to you

For additional assistance, contact your Tier 1 resource, as noted on the Workday Help website: workday.trinity-health.org.
Delegation

Business Process Steps and Roles

As a manager, you must ensure your responsibilities are covered when you are out on leave (e.g. PTO, short-term disability).

In Workday, you may delegate your tasks to a peer(s) or a superior(s) — this includes initiating new business processes and responding to any business processes that are in motion.

You may delegate different tasks to different people, meaning you can split your responsibilities among different peers/superiors, if preferred.

After you request the delegation(s), the process will be reviewed/approved by your manager. This is more of an FYI so that they know your business processes have been delegated.

When to Use

Use this process to assign a delegate(s) to perform your tasks while you are out on leave.

Related Reports

- Business Processes for Delegation
- Business Process Tasks Not Delegated
- Current Delegations
- My Delegations

NOTE: Only colleagues who are considered your peers or superiors in the organizational chart are eligible to be named as a delegate.
Delegation

**Before You Start**

Ensure local policies and procedures have been followed. This may include:

- Discuss distribution of tasks with your manager
- Discuss your leave with your delegate(s), including their responsibilities while you are gone, any circumstances they should be aware of, and whom to call if they have questions

**Data Needed for Delegation**

The following data will be required:

- **Begin Date**: Date the delegation will start
- **End Date**: Last day of delegation (if known)
- **Delegate**: Name of peer(s)/superior(s) who will be named as delegate(s)
- **Start on My Behalf**: Processes the delegate may start (initiate) on your behalf

**NOTE**: This process should NOT be used to delegate tasks on an ongoing basis.

For additional resources or to contact your Tier 1 resource, go to the Workday Help website at workday.trinity-health.org.
Set Your Delegations

**Process Steps**

1. Log in to Workday
2. Click the **cloud icon** and then click **View Profile**
3. Click the **prompt icon ("brick")** and then click **Business Process** and **My Delegations**
4. Click **Manage Delegations**
Set Your Delegations

Process Steps (continued)

5. Complete the Business Processes allowed for Delegation form (* indicates required information)

- **Begin Date**: Date the delegation will start
- **End Date**: Last day of delegation (if known)
- **Delegate**: Choose a delegate from your Peers or Superiors
- **Start On My Behalf**: Choose all processes the delegate may start (initiate) on your behalf
- **Do Inbox Tasks On My Behalf**: Choose all processes the delegate may move forward from your Workday inbox (review/approve) on your behalf

**NOTE**: When you delegate the creation of an item, you give the delegate access to all of your previously created items of that type.

**WHAT IS THIS?**

SCREEN INSTRUCTIONS CONTINUE ON NEXT PAGE
Set Your Delegations

**Process Steps (continued)**

6. Complete the Business Processes allowed for Delegation form (continued) (* indicates required information)

7. Click the **add icon** to assign additional delegations (to delegate specific processes among multiple peers/superiors)

**NOTE:** When you delegate the creation of an item, you give the delegate access to all of your previously created items of that type.

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**WHAT IS THIS?**

Retain Access to Delegated Tasks in Inbox

Clicking the box (yes) means both you and your delegate will receive the Workday Inbox notifications

**SCREEN INSTRUCTIONS CONTINUE ON NEXT PAGE**

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Set Your Delegations

**Process Steps (continued)**

8. Type comments and click **Submit**

9. Delegation selection is sent to Manager for approval; click **Done**

10. To see confirmations of your delegation request, click the **cloud icon** and then click **Notifications**

**NOTE:** The Manager cannot change any part of the request or send it back; therefore, the approval is more of an FYI so that they know your business processes have been delegated.

**NOTES:**
- Notifications is a different view than the Workday Inbox.
- The peer(s)/superior(s) who are assigned delegations will also receive a Notification.
View Your Delegations

Process Steps

1. Log in to Workday
2. Click the cloud icon and then click View Profile
3. Click the prompt icon and then click Business Process and My Delegations
4. Click each tab to see your delegations
Remove/Update Your Delegations

**Process Steps**

1. Log in to Workday
2. Click the **cloud icon** and then click **View Profile**
3. Click the **prompt icon ("brick")** and then click **Business Process** and **My Delegations**
4. Click **Manage Delegations**
Remove/Update Your Delegations

Process Steps (continued)

5. To **remove** a delegation: click the **subtract icon**

   OR

To **update** a delegation: change the information within the delegate row

6. Type **comments** and click **Submit**

   **NOTE:** An update will send a confirmation/review request to your manager.
Acting as a Delegate — Initiate a Process

**Process Steps**

1. Log in to Workday
2. Click the **cloud icon** and then click **Switch Account**
3. From the Delegation Dashboard, use the search box to start the business process

Find the applicable job aid on the Workday Help website at [workday.trinity-health.org](http://workday.trinity-health.org).
Acting as a Delegate — Check Process Status

**Process Steps**

1. Log in to Workday
2. Click the cloud icon and then click Notifications
3. From the Workday Delegated Tasks Update notification (left side), click View Entire Delegation Inbox (right side)

**HINT:** Status of task is mentioned here.
Acting as a Delegate — Check Process Status

Process Steps (continued)

4. Click the tab to see the details

**Tasks**
View the current actions you can take as the delegate

**Process Status**
View the status of processes you have initiated as the delegate

**Notifications**
View notifications of delegation requests

**Delegation Settings**
View all tasks that have been delegated to you

**WHAT IS THIS?**

**HINT:** Click the View button on any tab to see more information or to change the settings on the view (e.g., show unread only, show a date range).
Acting as a Delegate — Continue a Process

Process Steps

1. Log in to Workday
2. Click Inbox
3. Find the email and click to open (opens in the right pane of the screen)
4. Click Switch Account
5. Click OK

NOTE: You may only continue a process if “Do Inbox Tasks On My Behalf” was chosen in the delegation setup.
Acting as a Delegate — Continue a Process

Process Steps (continued)

6. Click the **cloud icon** and then click **Inbox**

7. Continue the applicable process

Find the applicable job aid on the Workday Help website at [workday.trinity-health.org](http://workday.trinity-health.org).
Appendix
What Should I Do on Day One?

1. Sign into Workday and click Let’s Get Started.

2. Click the Personal Information worklet and review your personal information, address, contact information, photo, etc.
   - Click in the View column and verify that your personal information is correct.
   - Click in the Change column and edit your personal information and type your emergency contact information.

3. Go to the Home page and click the Benefits Worklet and review benefit elections, dependents and life insurance beneficiaries.
   - Click in the Change column if you need to change/add life insurance beneficiaries.

4. Go to the Home page and click the Pay Worklet to view withholdings, pay slips, total compensation and tax documents.
   - To change withholdings or direct deposit accounts, click Withholding Elections.

5. Go to the Home page and click My Org Chart to see the department Org Chart.

6. Check your Inbox, security access, corrections, escalations, etc.
Manager Job Aids

- Create/Edit Job Requisition
- Recruiting Process
- Refer a Candidate
- Change Job
- End Additional Job
- End Non-Employee Contract
- Request Compensation Change
- My Team
- Termination
- Delegation
- Mobile Access (Android & iPhone devices)
- Performance Management
  - Setting Goals