Workday Training for People Managers

Termination
Reporting
Goals
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

It's never too late…

To accept change
The only constant in life is change.
In nature, in society, in relationships, at work,
Things change.
And they change constantly
See it as part of the larger picture,
As normal.
Don’t fight it.
Adapt to it.
<table>
<thead>
<tr>
<th>Agenda</th>
</tr>
</thead>
<tbody>
<tr>
<td>❑ The Termination Business Process</td>
</tr>
<tr>
<td>❑ Workday Reports</td>
</tr>
<tr>
<td>❑ Setting Goals</td>
</tr>
</tbody>
</table>
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:
- Identify the steps of the Termination business process
- Recall the reporting capability of Workday
- Identify how to construct goals

Note: For this session you will not have access to Workday
The Termination Business Process
Terminating an Employee

As a manager, you may initiate the Termination process for your team members only.

When to Use

Use this process to terminate a colleague for one of the following voluntary or involuntary categories. You will also be required to choose a subtopic(s).

Voluntary:
- Assignment Ended
- Disability
- Dissatisfied with Position
- Employee Requirements
- Personal Reasons
- Retirement
- Transfer to Non Workday Affiliate
- Withdrawn
Termination

Process Steps

1. Log in to Workday
2. Click My Team
3. Click Terminate from the Actions column

NOTE: Before you can terminate a colleague, you must end any additional jobs that may be assigned to him/her. See the End Additional Job job aid for more information.
Termination

Process Steps (continued)

4. Type the name of the employee (colleague) whose employment is being terminated

5. Click **OK**

6. Click the **edit icon** next to Details
Termination Demo
Termination Tips

• When terminating a colleague because of a voluntary transfer to a non-Workday RHM:
  • Type the name, city and state of the new RHM in the comments field
  • A HR rep or HR Service Center rep should have a conversation with the new RHM to complete the process (same as the current process today)
Q & A

Use Chat to write your questions
Workday Reports
Our Reporting Strategy as an Organization

- Users in Workday will have access to run reports and can run both delivered and custom reports. Report results are limited to the data a user can see in Workday.
- Workday has over 2000 delivered reports.
- Over 100 custom reports have been built and included in a ‘Reports Library’.
- Centralized reporting and governance model to avoid performance impacts in the tenant.
Accessing Workday Reports

**Standard (Delivered) Reports:**
- Standard (delivered) reports are accessible by either searching for them or running two report worklets called ‘Workday Standard Reports I Can Run’ and ‘Workday Standard Xpresso Reports’
- Delivered reports come in two types: Report Writer or Xpresso
  - Report Writer type reports can be requested to be made custom
  - Xpresso type reports are delivered ‘as is’ by Workday

**Custom Reports:**
- Custom reports are created either from copying an existing delivered report or as a brand new report
- RHMs can run custom reports found in the TH Custom Reports Library worklet
- An RHM may have a custom report worklet of their own to house reports that are specific to them only
Accessing Workday Reports

Search here

Access reports via custom worklets
Adding Worklets To Your Home Page

Click on the ‘Wheel’

Click on the plus (+) sign to add new worklets
Adding Worklets To Your Home Page

Configure Worklets

Required Worklets
The following worklets are required on your Home page.

<table>
<thead>
<tr>
<th>Worklet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inbox</td>
</tr>
<tr>
<td>Personal Information</td>
</tr>
<tr>
<td>Pay</td>
</tr>
<tr>
<td>Benefits</td>
</tr>
<tr>
<td>Directory</td>
</tr>
<tr>
<td>My Team</td>
</tr>
<tr>
<td>Birthdays</td>
</tr>
<tr>
<td>Anniversaries</td>
</tr>
<tr>
<td>Compensation and Benefits Dashboard</td>
</tr>
<tr>
<td>Workforce Planning Dashboard</td>
</tr>
</tbody>
</table>

Optional Worklets
Select the optional worklets you would like to include on your Home page.

<table>
<thead>
<tr>
<th>Worklet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Xpresso Reports (W)</td>
</tr>
<tr>
<td>TH Custom Reports Library (W)</td>
</tr>
</tbody>
</table>

Search or enter the worklet name. Click on the plus (+) sign to add additional worklets.
## TH Custom Reports Library

Access custom reports under these library categories:

<table>
<thead>
<tr>
<th>Reports Library Category</th>
<th>Category Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Absence Reports Library</td>
<td>A series of Absence related custom reports for use by all RHMs</td>
</tr>
<tr>
<td>Audit Reports Library</td>
<td>A series of Audit related custom reports for use by all RHMs</td>
</tr>
<tr>
<td>Benefit Reports Library</td>
<td>A series of Benefit related custom reports for use by all RHMs</td>
</tr>
<tr>
<td>HR Reports Library</td>
<td>A series of HR related custom reports for use by all RHMs</td>
</tr>
<tr>
<td>Labor Relations Reports Library</td>
<td>A series of Labor Relations related custom reports for use by all RHMs</td>
</tr>
<tr>
<td>Payroll Reports Library</td>
<td>A series of Payroll related custom reports for use by all RHMs</td>
</tr>
</tbody>
</table>
Prompting For Organizations By Type

Select ‘Organizations by Type’ from the prompt

You can select from many different Org types. When selecting by Cost Center or Supervisory Org, it is best to enter it in the search box as there are too many results to list. Selecting an Organization hierarchy such as Company or Supervisory Org will only give you results at the highest level unless you check the ‘Include Subordinate Organizations’ box.
Reports: A Demonstration
Ad Hoc Reporting

• Ad Hoc reporting can be accomplished by using both the delivered and custom reports

Employees working from home with their home address
Ad Hoc Reporting

• Any report can be exported to Excel from the results screen. Using ‘Notify Me Later’ will allow you to run the report to either Excel or PDF.
How do I request a new custom report?

- Workday delivered report?
  - No
  - Custom report from the TH Custom Reports Library?
    - No
    - Email: Workday Reporting Support at hqisworkdayreptspppt@trinity-health.org
Q & A
Talent Management: Goals
Benefits of Setting Performance Goals

- Help provide focus so that we strive for and accomplish tasks during a performance period.
- Are powerful tools that provide a path to align individual efforts with the team as well as the organization's strategy.
- Can be effectively measured as they are accomplished (especially SMART goals).
- Enables you to clarify with other people what you are trying to do, and therefore helps identify what is needed from others to successfully complete the goal.
- Create a focused set of intentions and desires, when thought out and stated.
Our Goals Should Align with…

Our Mission
We, Trinity Health, serve together in the spirit of the gospel as a compassionate and transforming healing presence within our communities.

Our Vision
As a mission-driven innovative health organization, we will become the national leader in improving the health of our communities and each person we serve. We will be the most trusted health partner for life.

Our Core Values
- Reverence
- Commitment to those who are poor
- Justice
- Stewardship
- Integrity
Goal Setting & Alignment

Goal setting, check-ins, mid-year reviews, and self-assessments create an atmosphere of trust, clarity and encouragement…with fewer surprises; and helps colleagues to perform at a higher level.

FY17 Performance Management Process

Recommended that each colleague have a minimum of two (2) check-in’s per annual evaluation year.
The FY17 Goals & Alignment

Goal setting with all colleagues should have occurred July-September 2016.

Goal setting is an opportunity for leaders to help our colleagues understand how what we do connects to our People-entered 2020 Strategic Plan.

All leaders need to have a goal that supports People-Centered 2020 as well as a goal that utilizes innovation or performance excellence tools.

**Note:** More information about innovation and performance excellence tools can be found on HealthStream. Search for the following course: TH – Innovation and Performance Excellence Introduction.
Use SMART Goals: What Are They?

SMART is an acronym used to make sure your goals are as effective as they can be.

- **Specific:** Be clear about what is to be done.
- **Measurable:** How will you prove or demonstrate the goal?
- **Achievable:** Is it realistic and within reach?
- **Relevant:** Is it within the scope and aligned to an organizational goal?
- **Time Bound:** Do we know when it must be done?

SMART goals have been found to be a very effective method of motivating colleagues to perform at peak levels.
An Example of a SMART Goal

Improve this year's *project completion on time* average to 80%, from last year's average of 60% by the end of this fiscal year.

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