Workday trouble shooting guide

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HIRE PROCEDURES

I hired the wrong person by mistake/created a duplicate record; What do I do?

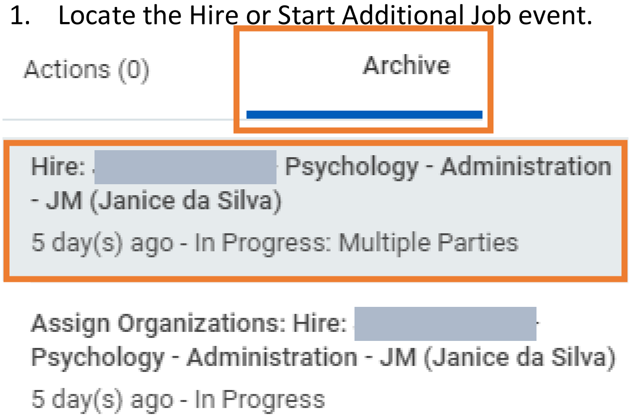
- If you have hired an incorrect employee, or created a duplicate record, your next steps will depend on what stage the hire is in (see options A & B below):

A. If the hire is still in the review and approval stage (Overall status: In Progress): **Cancel the Hire**

The hire can be cancelled in two ways:

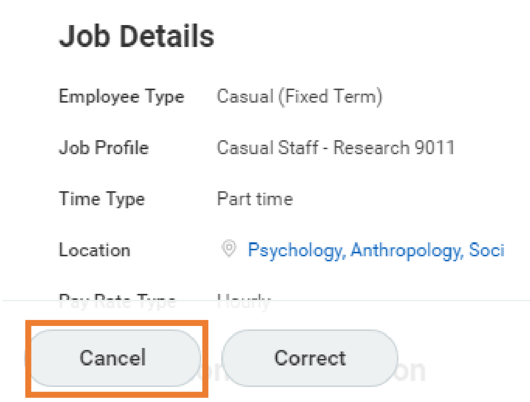
1. From the Archive section of your Workday Inbox:

1. Locate the Hire or Start Additional Job event.



2. At the bottom of the screen, there will be the option to **Cancel** or **Correct**. Correct will take you to the Job Details screen where you can correct items such start and end dates, number of hours or job title.

Note: Compensation and accounts cannot be corrected once submitted. If you need to update either of these, click **Cancel** to start over or contact hrhelp@uwaterloo.ca to have them send the hire back if not finalized yet.



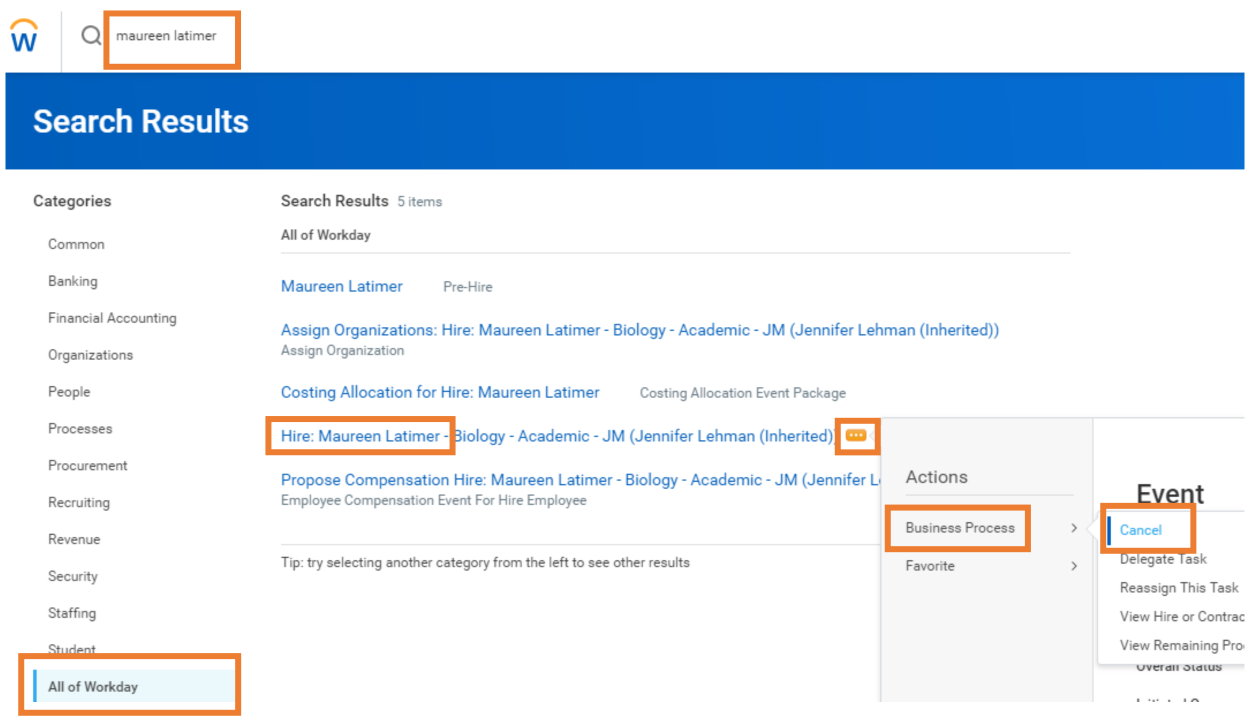
3. Scroll down to the end of the hire details to enter a comment in the comment field box and click **Submit** once complete.

Tip: If you cancelled and are redoing the hire, the employee created will still exist in the system as a Pre-Hire and upon re-entering the Hire Details, you will be able to select *Existing Pre-Hire* rather than creating them again.

2. By typing "event:" and the employee name into the Workday search bar:

1. Type **event:** followed by the employee's name into the main workday search bar and press enter on the keyboard, i.e., **event: Sam Smith**
2. Find the overall process you have initiated (i.e. for a hire/rehire – *Hire: Sam Smith*. For an Add Job – *Start Additional Job: Sam Smith*) and hover over it to bring up the related actions (3 orange dots).
3. Click the related actions (3 orange dots) and hover over **Business Process** to select **Cancel.**
4. Scroll down to the end of the hire details to enter a comment in the comment field box.
5. Click **Submit** once complete.

Tip: If you cancelled and are redoing the hire, the employee created will still exist in the system as a Pre-Hire and upon re-entering the Hire Details, you will be able to select *Existing Pre-Hire* rather than creating them again.



B. If the hire has already gone through (Overall status: Successfully Completed): **Send an email to** hrhelp@uwaterloo.ca to let them know a hire has gone through for the wrong person and they will advise on next steps.

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I can't enter anything in the Position field on the hire screen.

- The position field only populates for position management hires (staff contract and ongoing positions). If you are seeing this field, you have not selected the job management (JM) supervisory organization for your hire. Cancel the hire by clicking Cancel at the bottom of the screen and then Discard when prompted, and start the hire over, this time selecting the supervisory org with JM denoted in the title. If you are still getting the position field after hiring under JM, your manager will need to submit a permission request for you to be a Campus Partner for that sup-org.

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I'm getting an error that the SIN I entered for a new hire is a duplicate; what do I do?

- If you are receiving a duplicate SIN error message, that means the employee you are trying to hire already as a record in Workday and you should be rehiring them under that record if they are terminated, or adding a job if they are an active employee. Please cancel the hire and once cancelled, look the employee up by typing "Employee Search" in the Workday search bar to search for the employee. If you cannot find them, contact hrhelp@uwaterloo.ca with the details and they will help determine what name the employee is in the system under.

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I should have skipped a step, but I clicked open by accident. How do I get out of it now?

- If you clicked Open instead of Skip, go to your Workday inbox to view it from there. Click the gear icon in the top right corner of the task and select Skip This Task and then OK.

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When will my hire be finalized?

- The hire will be finalized once it goes through all the approvals in Workday. The typical approval path looks like this – *Initiator > Human Resources > Supervisory Org Manager (if not Initiator) > Cost Center Manager > Office of Research (if paid from a research account) > Human Resources (final review)*.
  New hires must complete onboarding action items once the hire is finalized to ensure there is no delay in payments. You can view your direct reports' onboarding status by clicking the *Onboarding Status Summary* application from your Workday home screen.

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When will the employee receive notification to log into Workday?

- The new employee will receive an invitation email from WatIAM as soon as the hire is finalized in Workday. This invitation will ask them to click 1 of 2 links – one to claim their WatIAM if they already have one, OR one to create a new WatIAM for brand new employees. A link to sign into Workday will also be provided. They will also receive a Daily Digest email from Workday to let them know there are onboarding action items to complete in their Workday inbox. They will not be able to login until after the hire is finalized.

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I need to hire someone prior to the hire date of their current job in Workday.

- Workday will not allow a new hire to pre-date a current hire that is already in the system. If this is a casual employee and the hours can be entered after the current hire date in the system, add a job with the same date. If this hire does need to be entered prior to the date that the system will allow, please contact hrhelp@uwaterloo.ca and they will advise on how to proceed.

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Why was my hire denied?

- To view the comments for denied hires, click the notification link found in the body of the notification to go to the hire event details page. From there, click the Process tab beside Details (underneath Overall Status) and scroll down to view the comments in the last column. Common reasons for hires to be denied are:
    - The employee already exists as a pre-hire (use the existing employee ID to hire)
    - The employee is currently working at UW (use the Add Job process to hire)
    - Multiple instances of the same hire have been initiated. In this case, HR will deny the duplicates.

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How do I check the status of my hire?

- Type “event:” followed by the employee’s name into the main Workday search bar and press enter. Find the Hire: Employee Name event (i.e. Hire: John Doe), or Start Additional Job: Employee Name, and click on it to go to the hire event details page. From there, click the Process tab beside Details (underneath Overall Status) and scroll down to view the Awaiting Action status to see where in the process it is sitting.

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What is a Pre-Hire?

- A Pre-Hire is an individual in Workday that is not currently assigned to a job. Examples are terminated employees, or employees created who have not yet been fully hired.

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I clicked Done instead of Open or I was logged out in the middle of a hire process; do I need to start over?

- No. The next step in the hire process will be sitting in your Workday inbox as an action item. You will be able to proceed from there to complete the hire process.

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When do I process a one-time payment?

- One-time payments should be used for non-UW employees who are receiving the following types of payments:
    - Award
    - External reviewer/examiner/assessor
    - Honourarium of $500 or less
    - Research participant payment of more than $300
    - External guest speaker/lecturer

Individuals who qualify for the above payments will need to be hired into Workday as casual employees, following the steps in the Hire for a one-time payment user guide.

- If the person you need to pay is a current UW employee, you will need to fill out the One Time Payment Request Form (paper form) to send to Payroll in EC1.
- If the employee is external but does not fall into one of the categories listed above, confirm the type of payment with payroll@uwaterloo.ca and they will let you know how to proceed.

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Why hasn't my casual employee been paid?

- Casual employees are paid by entering hours into the Time Entry system of Workday. They first need to be hired into Workday and once the hire is finalized, you, the employee, or a timekeeper on your team need to enter time for them by following the Enter time for casual staff user guide. If the employee or a timekeeper entered the hours, you will need to approve them in Workday in order for them to be paid. Please see the Pay Dates webpage for payroll cut-off dates.

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ONBOARDING

Information was entered wrong in the onboarding process; how can this be changed?

- Once onboarding is completed, any personal and contact information can be updated through the Personal Information application. Banking information and tax elections can be updated through the Pay application by selecting the Payment Elections option for banking or Withholding Elections for tax updates. There are user guides on our website that can walk employees through updating their information on Workday.

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There is no option to select a country that is not Canada when attempting to enter passport information.

- Passport information is not required and should not be entered in the Passport and Visa task. Leave the passport table blank (delete any rows added) and enter Work/study permit information into the Visas table. For more information, please view the [Edit passports and visas user guide.](#)

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TIME ENTRY TROUBLE SHOOTING

I'm a staff member who worked additional time the week of a stat holiday/absence; do I need to do something different to enter these hours?

- If additional hours are owed for a week with a stat holiday or any other paid absence, after you auto-fill the schedule, make sure to delete the regular hours that populate under the stat/vacation/sick day(s). If you work a 35 hour work week, the time summary at the top right of the screen should show 28 regular hours and 7 time off hours (in the case of 1 paid day off). The additional time worked will show underneath overtime hours. Make sure the *Total Hours (excluding time offs)* is the total number of actual hours worked for the week and then submit.

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I am trying to enter casual hours into the Time application, and it won't let me.

- You can only enter hours into Workday as early as your start date. Check the start date listed in your worker profile.
- The Time Entry system gets locked during payroll processing and you will receive an alert if you attempting to enter hours during this time. Time entry is locked for monthly staff the Thursday

the week before the pay week and the Monday of pay week at noon for bi-weekly employees. Time entry re-opens the day before the pay date and any hours entered at that time will be paid on the next pay run.

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My manager received a request to approve my hours for one of my casual positions but I didn't submit them.

- If you have multiple casual positions, when hours are submitted for one position, any hours entered for other positions are also submitted. There is no limit to the number of times you can submit hours if additional hours have been added that need to be approved. Any hours that have already been approved will not go for approval again, unless something has changed.

  Because the time entry system requires hours to be approved by week, it is best practice to submit hours at the end of each week to streamline the process.

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How do I correct hours that have already been entered? Can I do this even after they have been approved?

- In the Time Entry screen, click on the time block you want to correct. Make your corrections and resubmit the hours for that week. Hours corrected after they have already been paid will show as an adjustment on the employee's next pay.

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If time is entered for multiple positions in the same week, which manager receives the approvals? Will all hours go to both managers?

- No. Hours that are entered on another position will only go to the manager listed for that position. If the hours have been submitted already, they will not go for approvals again, even though the summary page shows all hours for that week. If the hours are entered and have not been submitted, when you submit your hours for the week, it will also submit the additional position's hours, which will go to the applicable managers for each position.

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If I enter a cost center override on hours in time entry, will all associated benefits be charged to the override account as well?

- No, only the hours will be charged to the override account. All associated benefits (vacation pay, employer taxes, etc.) will remain charged to the default account. If this is an issue, an additional job can be added with a different cost center associated with it to allow all earnings and associated benefits and costs to be charged to a separate account.

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What if a casual has three positions - How is overtime determined?

- Overtime will be applied to the position where the time entry hours take the employee over the 44 hour threshold in a week.

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What is the impact of the employment end date on time entry?

- The end employment date does not terminate employment but is used for reporting and mass termination actions by the HR Administration team. If you are entering time for an employee whose end employment date has passed, the time entry will still be passed to payroll for processing. Although, for accurate employment records, please extend the end date with a Casual Job Change.

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TIME ENTRY APPROVAL REPORTS

Will the PI be able to view the time entry approval reports?

- The approval reports are generated from time entry approvals awaiting action in an individual's Workday inbox. If the time entry has a cost center override and the PI is the signing authority on the account that was entered, they will receive an approval action in their Workday inbox and will be able to view the approval report. Office of Research will also be able to view these reports when there are time entry approvals in their Workday inbox.

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Who has access to view the time entry and approval reports?

- Time Entry Data for My Organization – Timekeepers and Managers
- Time Entries for Manager Approval – Managers
- Time Entries to Approve for My Cost Center – Cost Center Signing Authorities

See the Types of Reports section of the Workday website to view available reports and who can access them.

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How do I access these reports?

- The reports that are applicable to you will be located under the *View* menu option in the Team Time application. The report names can also be typed into the Workday search bar for easy access.

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How am I supposed to remember what details were in the report, i.e. rate, cost center?

- The report can be exported to excel by clicking the excel icon on the top right of the table OR you can duplicate your browser window by right clicking on the browser tab and selecting "Duplicate"**.** This will allow you to have the information viewable in another window to reference while you are working.

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Will I have to flip back and forth from the report to my Workday inbox in order to approve hours?

- No. You can complete the approvals directly from the report. For more information, please view the Approve Time for Casual Staff user guide.

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If an employee has multiple positions, will they all display in the reports?

- Yes, you will be able to see all positions for which you are listed as the timekeeper. If you are approving time, you will see the position to which the time is associated.

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Can we add start and end dates to the report for Time Entry Data for My Organization?

- Unfortunately, we are unable to provide access to start and end dates at this point in time.

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Will the reports include student IDs?

- The reports will not contain student IDs or information on student positions. They will only contain information for casual employees.

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VACATION AND ABSENCE PROCEDURES

Why am I receiving an absence request for my student or casual employee?

- When employees have multiple positions on campus, any vacation or absence requests submitted will be sent to all managers for visibility, however only one manager needs to approve it. Once the required manager approves it, it will disappear from the rest.

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My staff member's vacation balance is wrong in Workday. How can I update it?

- Please reach out to hrhelp@uwaterloo.ca on behalf of your employee with the correct balance so HR can update it.

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Can I track flex or lieu time with Workday?

- Workday's current functionality does not include tracking lieu or flex time tracking. It only includes requests for vacation, leaves, and overtime tracking. Because there are varied practices across campus this was not in scope for the project launch but could be looked into at a future date.

How do I correct or cancel vacation time that has been requested in Workday?

- If the vacation time has not been approved yet: Cancel the request by following the Cancel an unapproved vacation request user guide
- If the vacation time has already been approved: Update the request by following the Change/cancel an approved vacation request user guide

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JOB CHANGE

How can I update the end date for an employee?

- Casual employees' end dates and pay rates should be updated directly in Workday. Reference the Casual job change user guide for assistance.
- Job changes for students and temporary and ongoing staff, should be submitted via the paper Change form, found on the Forms section of the Human Resources website.
- Faculty and non-faculty updates should be submitted via the appointment forms.

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TERMINATION PROCESSING

I need to initiate a termination for a primary job but the employee has an additional job and the system won't let me terminate it.

- Please email hrhelp@uwaterloo.ca with the details of what you are trying to do along with the termination date for the employee and they will advise on next steps.

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DELEGATION TROUBLE SHOOTING

Why is delegation not working? It was working a few days ago.

- When delegations are initially set up, they must have an expiry date. The delegation that was set up has likely expired and will need to be set up again by the delegating manager. Delegation instructions can be found on the Workday user guide website under the Manager/Administrator section.

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I set up delegation for approvals and tasks, but my delegate isn't seeing the approval requests or tasks.

- Ensure your delegate is clicking the cloud icon/profile picture and selecting **Switch Account** to act on your behalf. Available tasks (business processes) will be displayed on the home page of the delegation dashboard and approvals will be available in the delegation inbox.

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I delegated the absence calendar so that other managers in my department can see when my team members have booked vacation, but they cannot see it.

- The Absence Calendar cannot be delegated for someone to see the Team Absence Calendar on another manager's team. In order to view approved absence requests for members on another team, you can go into each individual team member's Time Off summary to see their approved requests.

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Can I set up a delegation so that someone on my team can view one of the manager reports available to me?

- Reports cannot be delegated. Most reports can be downloaded to excel so you can download and share them when appropriate

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If I set up a substitute in Unit 4 for Signing Authority, how does that translate to Workday?

- Signing Authority substitutes in Unit 4 are brought over into Workday as the Signing Authority on the accounts in Workday. This means that the substitute will receive Workday approval actions for new hires and time entry (when the cost center is overridden) for the accounts they are listed as a substitute for in Unit 4.

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