# WORKDAY USER GUIDE FOR MANAGERS

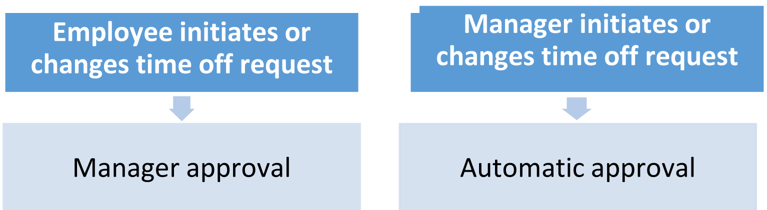
March 2023

# Table of Contents

# TIME OFF PROCEDURES

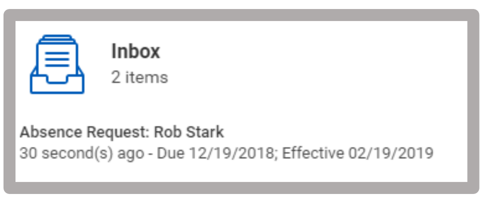
The steps listed below are intended to help you through how to request time off on behalf of an employee, as well as how to approve or correct employee submitted time off, like vacation. The same process is also used to put an employee on leave.

**Approval path:**

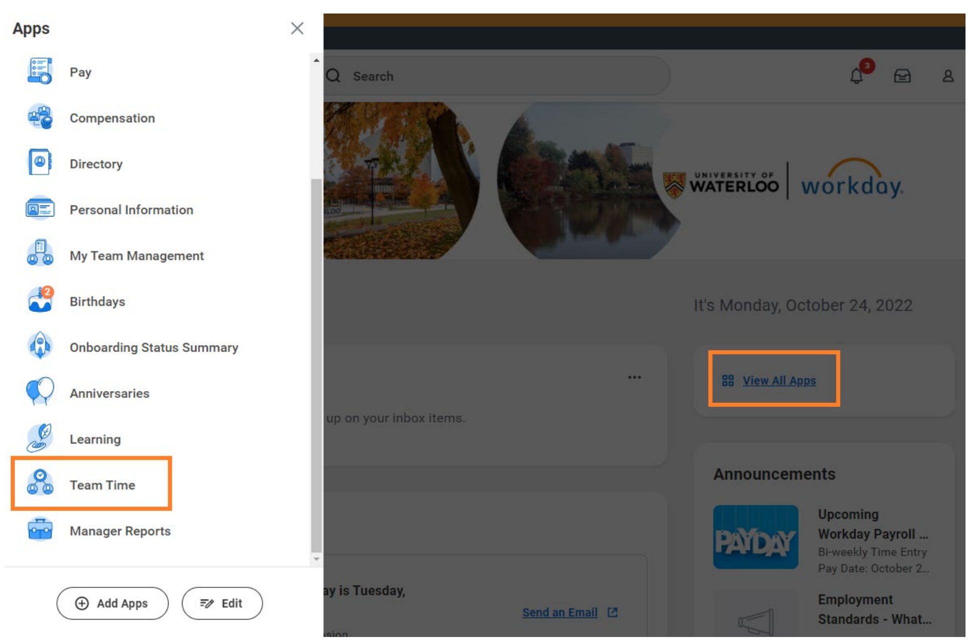



## APPROVAL OF TIME OFF REQUEST

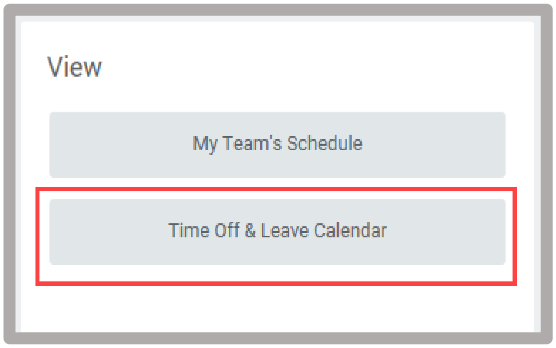
**Note:** Managers will be notified of leave/time off requests through the Workday inbox.



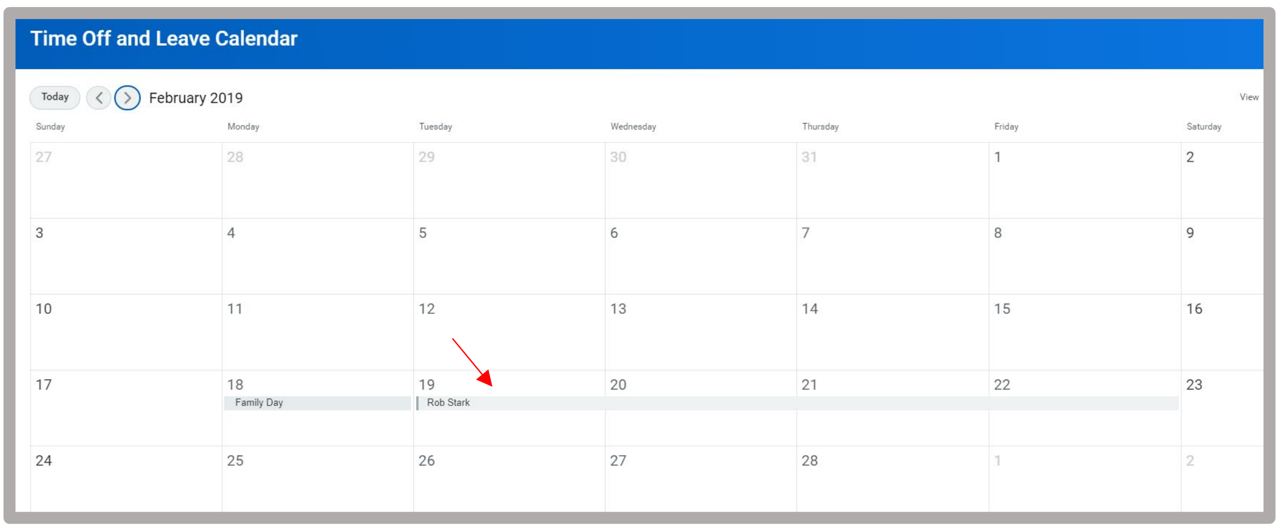

1. To review the team calendar, on the Workday homepage, click **View All Apps** to go to the **Team Time** application.



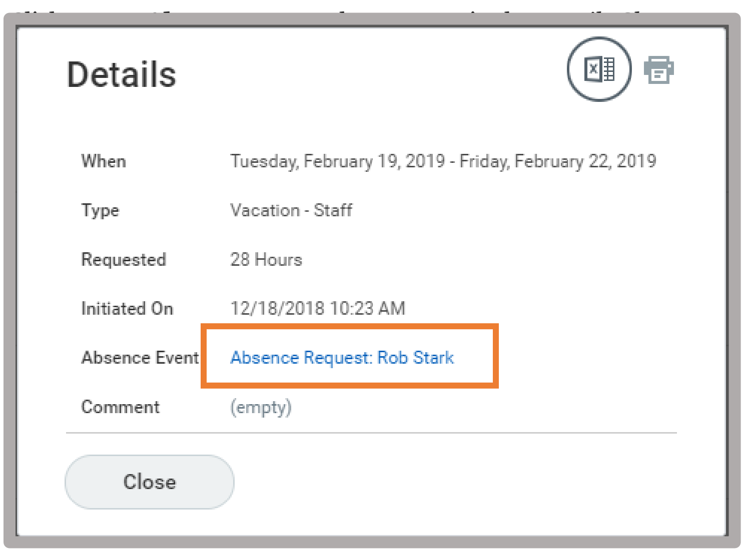
2. Select **Time Off & Leave Calendar** under the View menu.



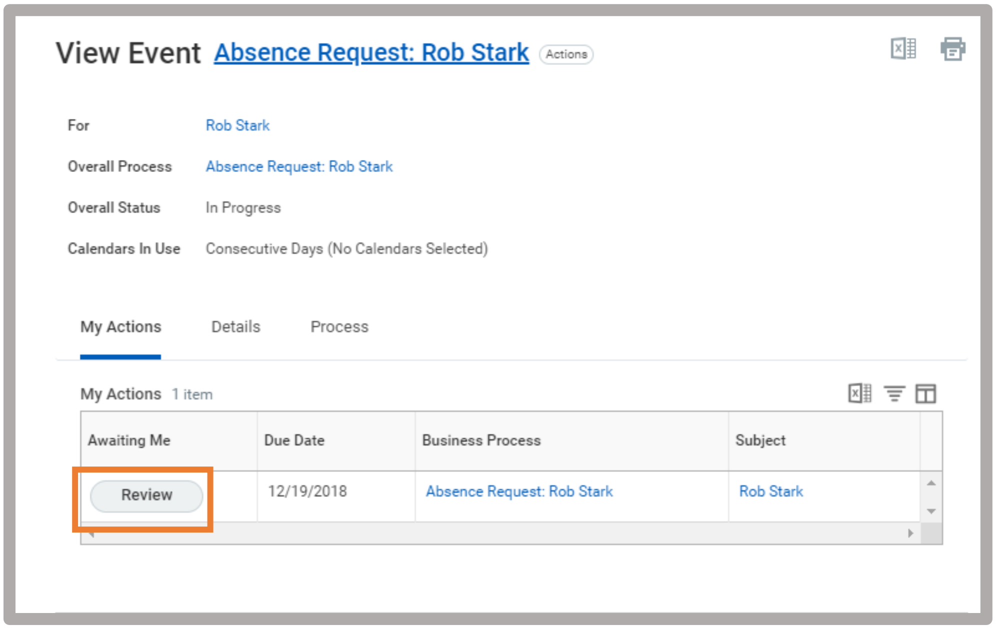

3. Navigate to the month of the employee's request to view your team's current vacation schedule.
4. Click on the bar that houses the employee name to view details about the absence request.



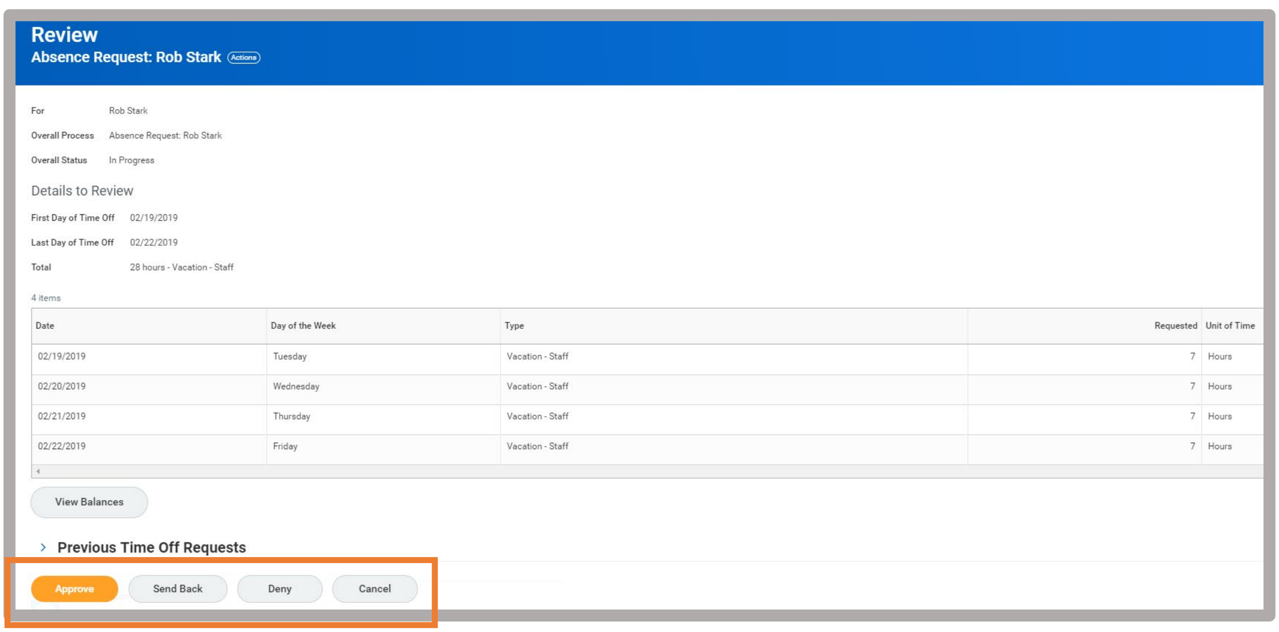

5.



6. Click **Review**.

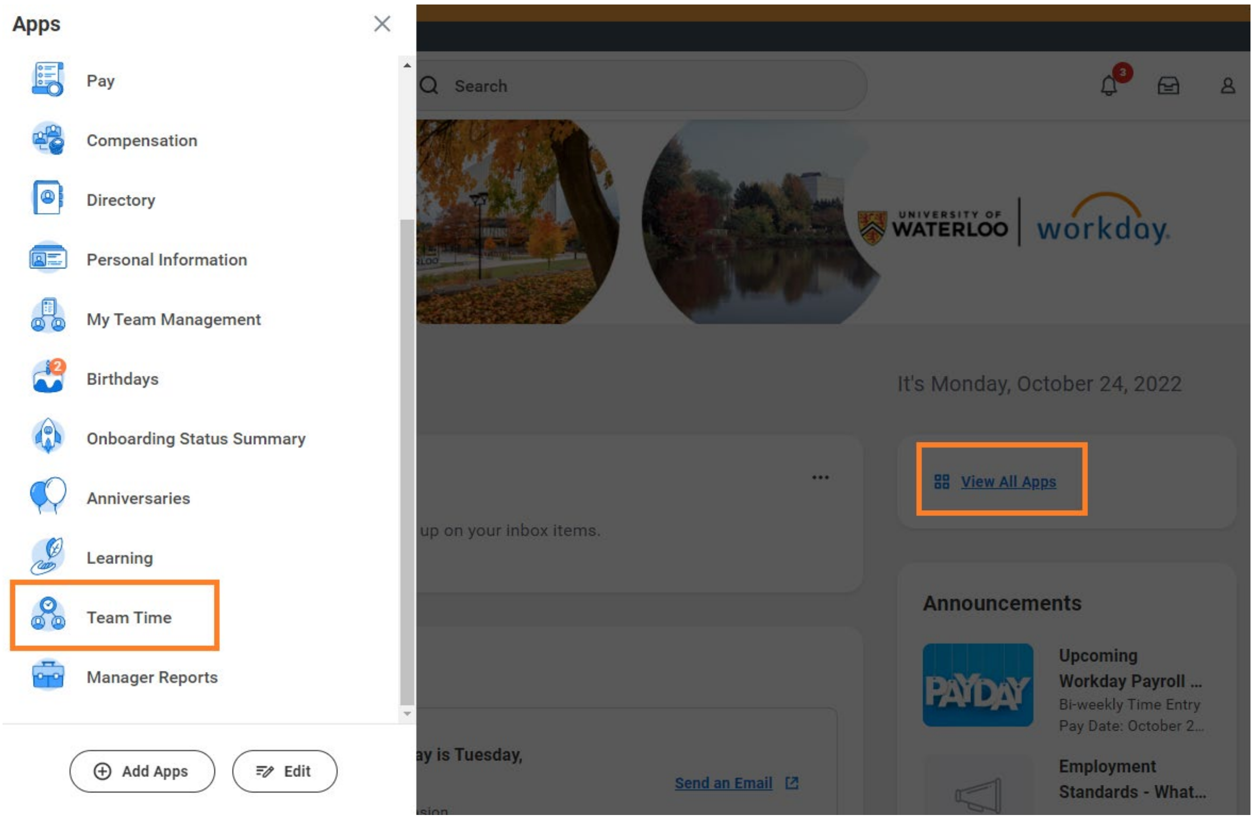



7. Click the appropriate action to **Approve**, **Deny**, **Send back**, or **Cancel** to close out and save for later.

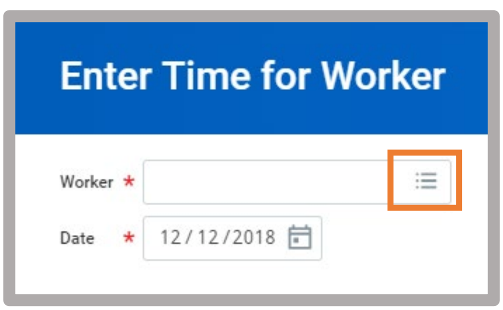


## ENTER ABSENCE FOR AN EMPLOYEE

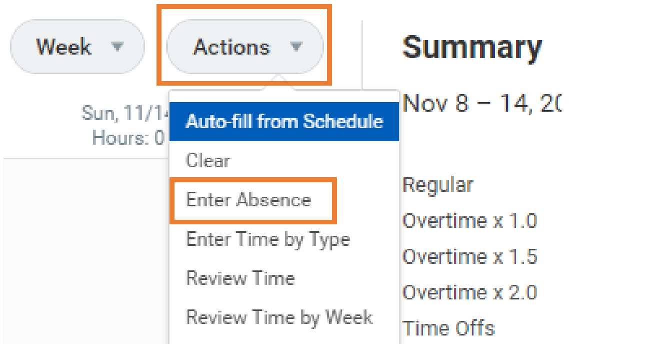
1. On the Workday homepage, click **View All Apps** to go to the **Team Time** application.



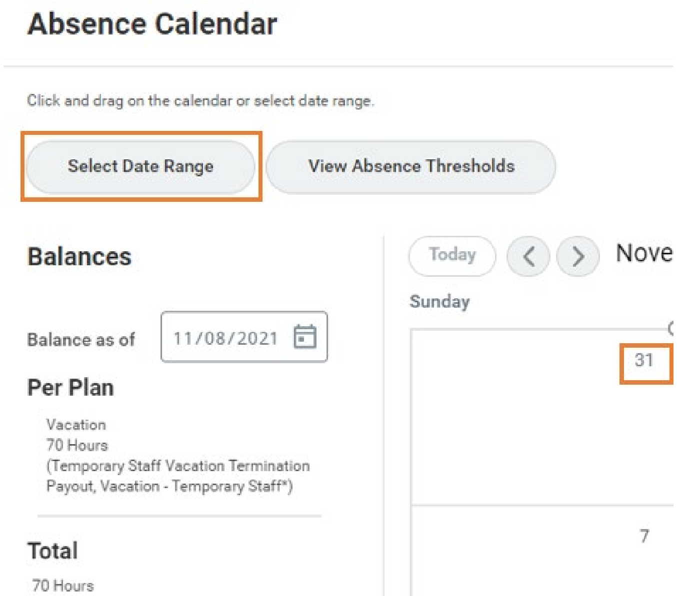

2. Select **Enter Time for Worker** from the Actions menu.
3. Use the search bar to locate the worker you want to enter time for as well as the date.



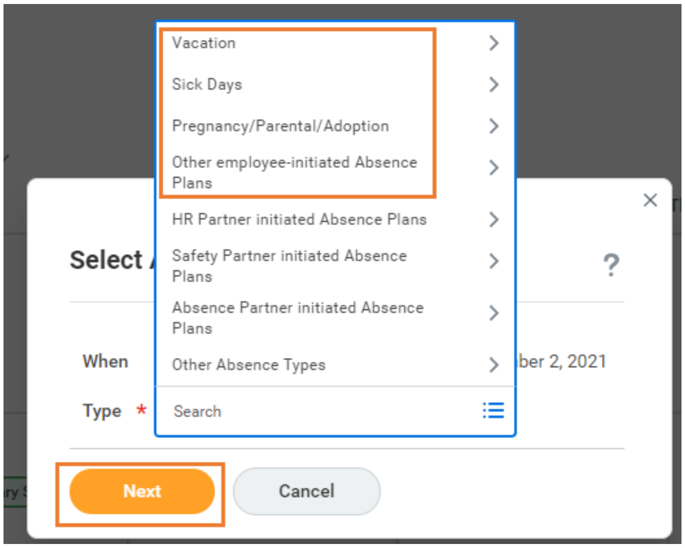

4. Click the **Actions** button and select **Enter Absence**.




5. Click the day(s) to book off in the calendar or click **Select Date Range** to book a larger block of time.




6. Once dates are selected, click **Request Absence** to choose the absence type and select **Next.**

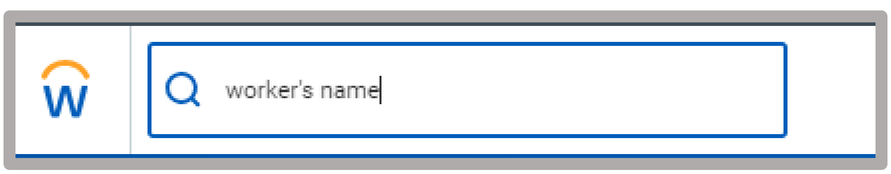



**Note:** A Reason Code for the requested Absence may be required. A red asterisk beside the 'Reason' field indicates that the field is required to proceed.

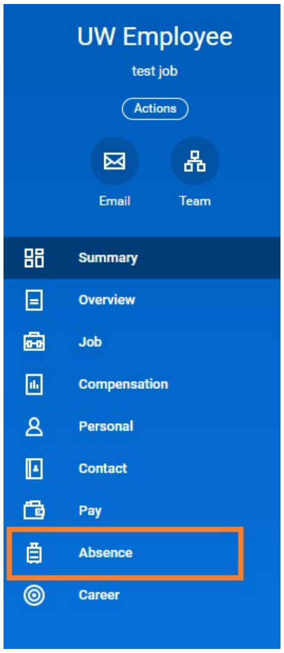
7. Review the time off and click **Submit**.

### CORRECT ABSENCE

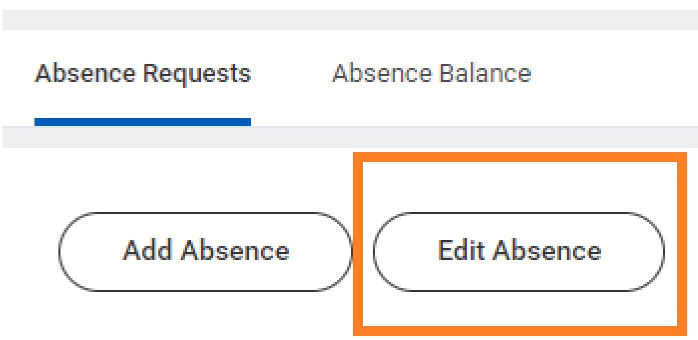
1. From the home page, type the employee name in the main **Search** bar and click the result that displays their name and position to navigate to their *Worker Profile*.




2. Select **Absence** from the main menu on the left side of the *Worker Profile*.




3. Click **Edit Absence** to go to the *Absence Calendar*.

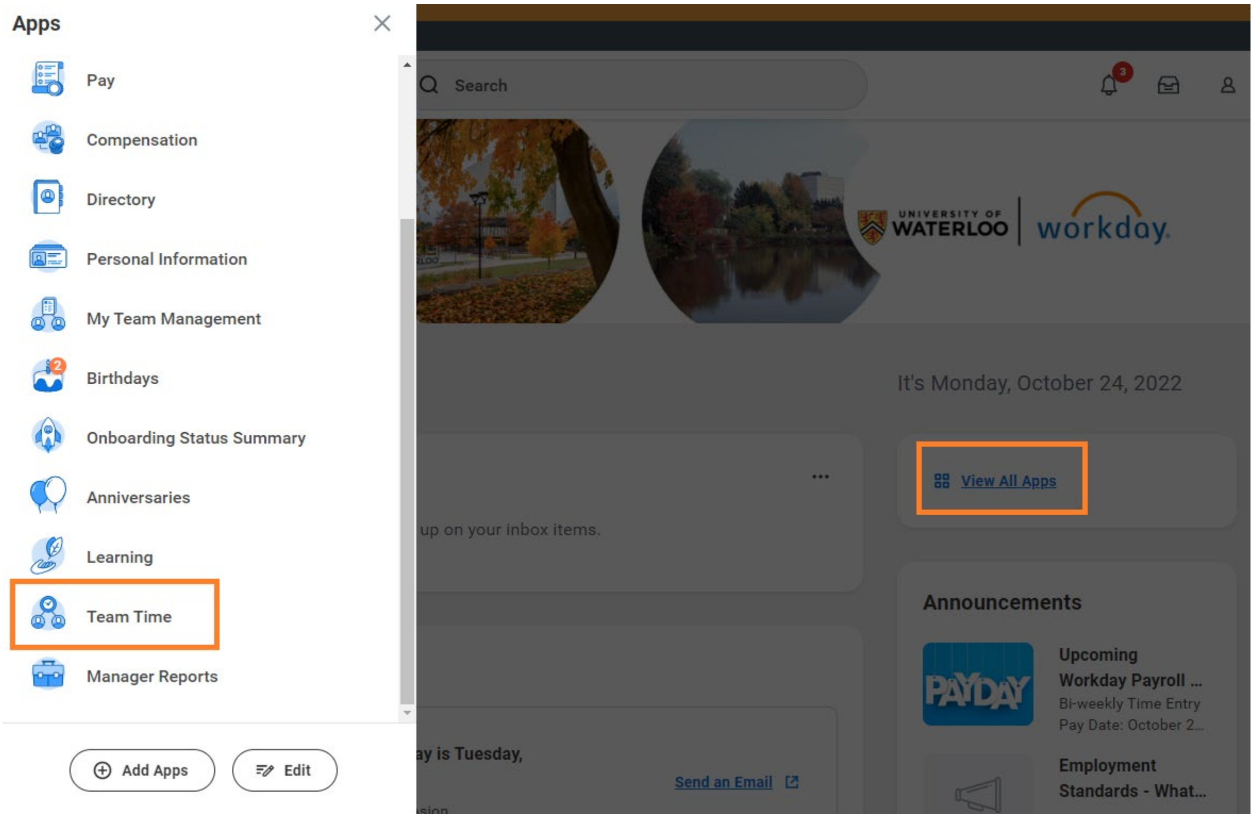



4. From the *Absence Calendar*, click on the grey bar associated with the time off/leave that you would like to edit.


5. Select the dates to be corrected and make the appropriate edits.
**Note:** Days can be deleted within the chart and the *Type* and *Quantity* (number of hours) are edited in the fields below after selecting the days to be edited.
6. Once completed, click **Submit** to finalize the transaction.

## VIEW TEAM TIME OFF CALENDAR

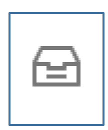
1. On the Workday homepage, click **View All Apps** to go to the **Team Time** application.

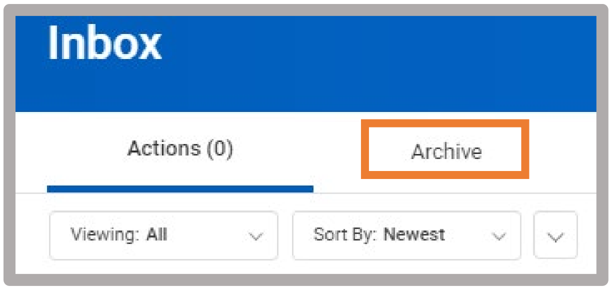



2. Select **Time Off & Leave Calendar** under the View menu.
   **Note:** Approved requests show with a green check mark and pending requests show in gray. You can approve pending requests from this screen by clicking on the request and then **Review**.

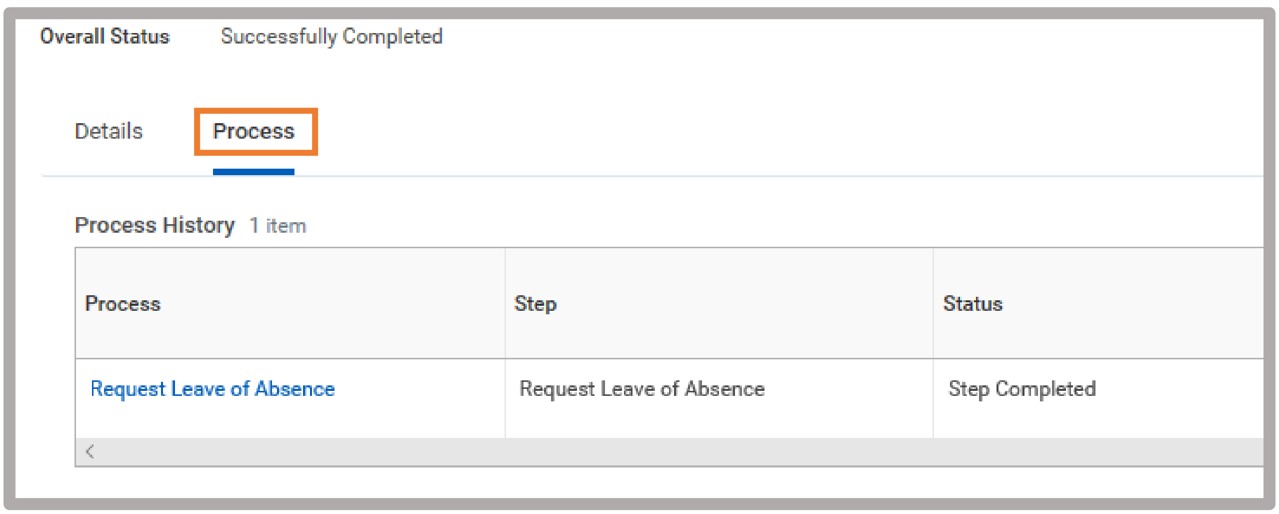
## VIEW STATUS OF REQUEST

1. At the top right of the Workday screen, click on the **Workday inbox**
2. Click on the **Archive** tab.






3. Find the relevant request in the archive list and click on it to open it in the viewing window.
4. Within the *View Event* screen, click on the **Process** tab to view the Process History.




## TIME OFF PROCEDURES TROUBLE SHOOTING

**Why am I receiving a vacation 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 the manager of the absence eligible position should approve/deny. Once the absence request is reviewed by the appropriate manager, it will automatically be removed from all other managers' inboxes.

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

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

**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.

# HIRING

## HIRE A CASUAL EMPLOYEE

**Hire initiation**
- Manager
- Delegate
- Campus Partner

↓

**Hire review - job details (dates, employee type, hours)**
Manager (if initiator is not the Manager or a delegated approver)

↓

**Hire review - job details (dates, employee type, hours)**
Human Resources Administration (HR Ops Partner)

↓

**Consolidated approval - compensation and funding sources**
- Office of Research (if paid from a research account)
- Signing authority

↓

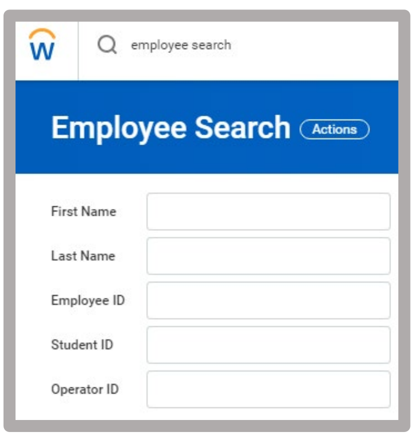
**Hire finalization**
Human Resources Administration (HR Ops Partner)

↓

**Onboarding - update banking, SIN, contact information, etc.**
Employee

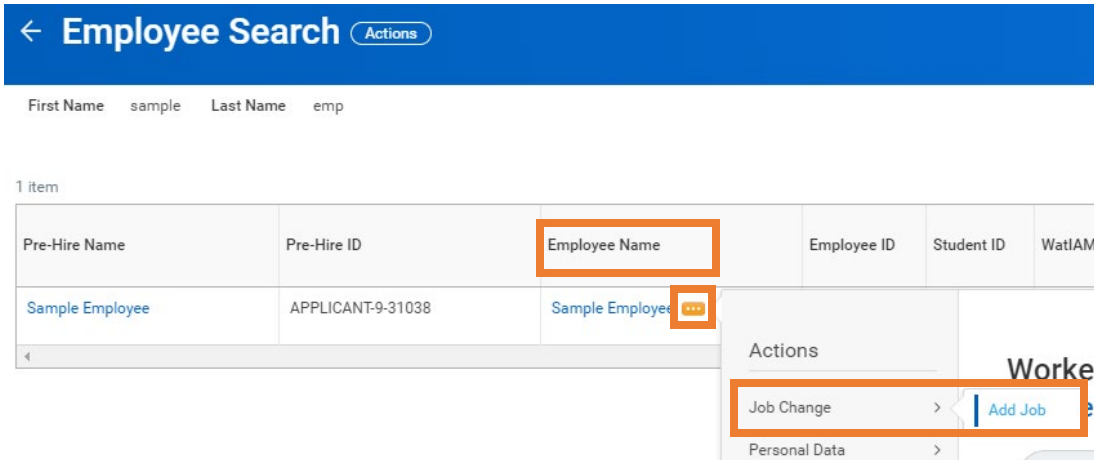
Follow the steps below to hire your casual employee into Workday. Once the hire is finalized, the manager, timekeeper, or employee can enter hours worked into the time entry system for payment.

1. Type **Employee Search** into the main search bar to access the search by employee ID, student ID search function to determine if the new employee exists in Workday.

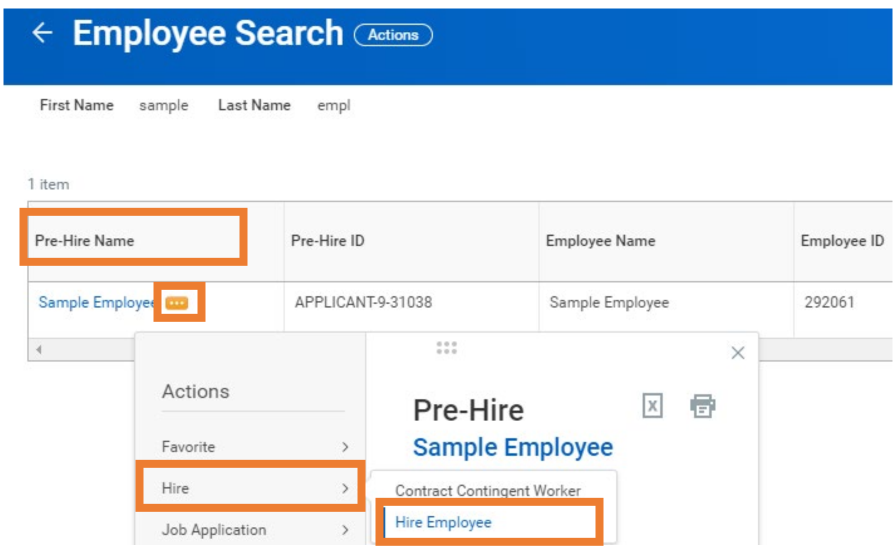



2. If their ***Employee Name***:
   a. Appears as a hyperlink: They are an active employee – hover over the **Employee Name** to click the related actions (3 dots) and hover over *Job Change* to select **Add Job** and continue from **step 3** below.

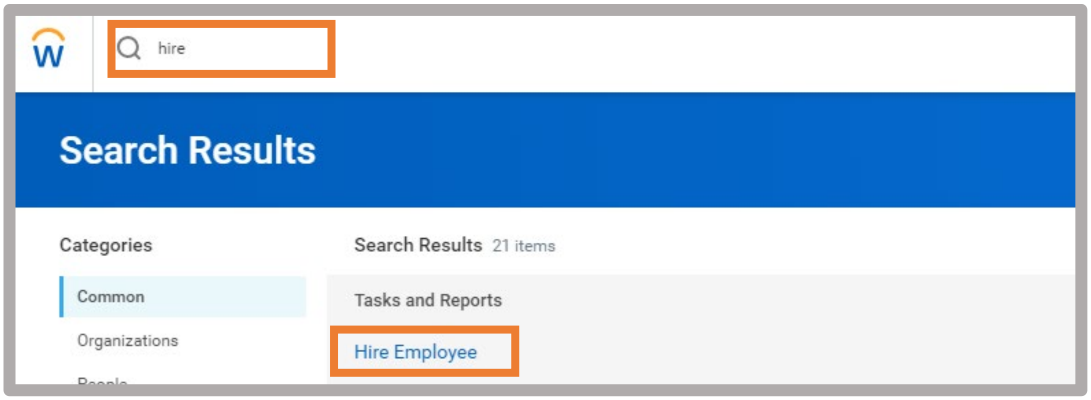
**Note:** If you are a manager and this is a former employee who most recently reported to you or is a retiree, their name will appear as a hyperlink, but there will be no *Add Job* option. In this case proceed with option "b" below.



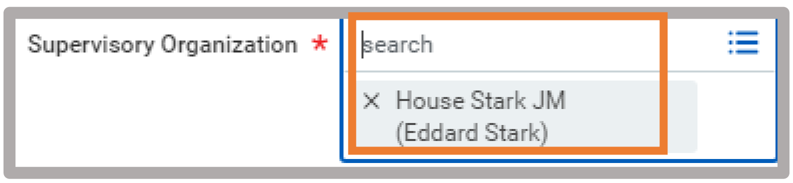

b. Appears in the search results as text, not a hyperlink: They are a former employee in Workday - hover over the **Pre-Hire Name** to click the related actions (3 dots) and select **Hire** to rehire them and continue to **step 3** below.




c. Does not appear: They are brand new to Workday – Type **Hire Employee** in the main search bar to hire them into the system and follow the steps below.



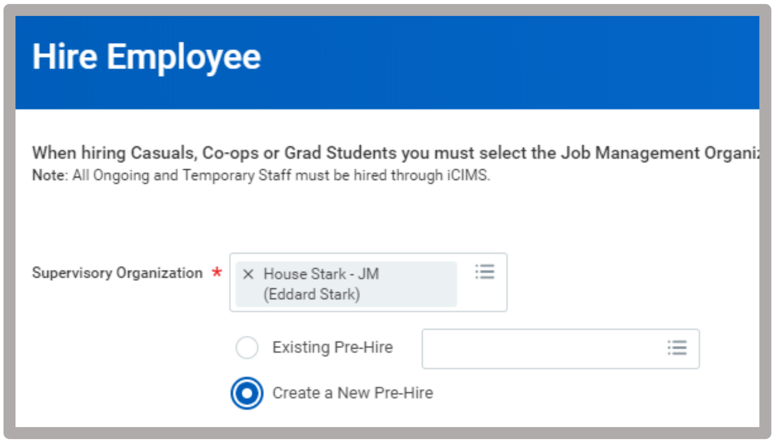

3. Type the manager name of the supervisory organization (sup org) you are hiring into, in the Supervisory Organization search field and press enter to pull up a list of available sup orgs. From the available options, select the appropriate one with 'JM' denoted in the title.




**Note:** *JM is short for Job Management. This is used to group positions without regular position numbers including casual and student employees.*

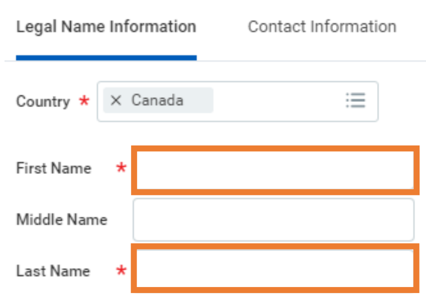
If you have not performed the *Employee Search,* please see step 2 before continuing.

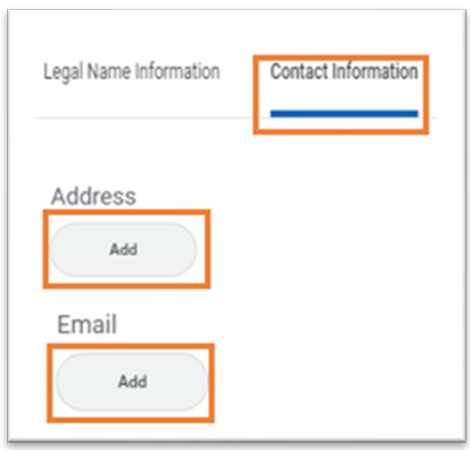
4. **If the Employee Search produced no results:**
Select **Create a New Pre-Hire** if the employee was not found in the *Employee Search* and click **OK** to continue to the *employee's contact information.*
**If this is a rehire based off the Employee Search:**
Their name will now be populated in the *Existing Pre-Hire field.* Click **OK** to continue to step 7 – *Enter the employee's job details.*




## ENTER THE EMPLOYEE'S CONTACT INFORMATION

5. Enter the employee's **First** and **Last Name** and then select the **Contact Information** tab to add a home address and an email address.



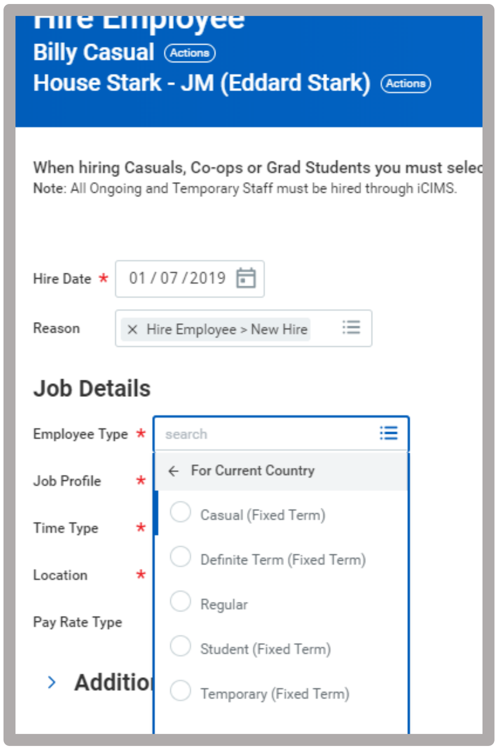




6. Click **OK** to continue to the job details.

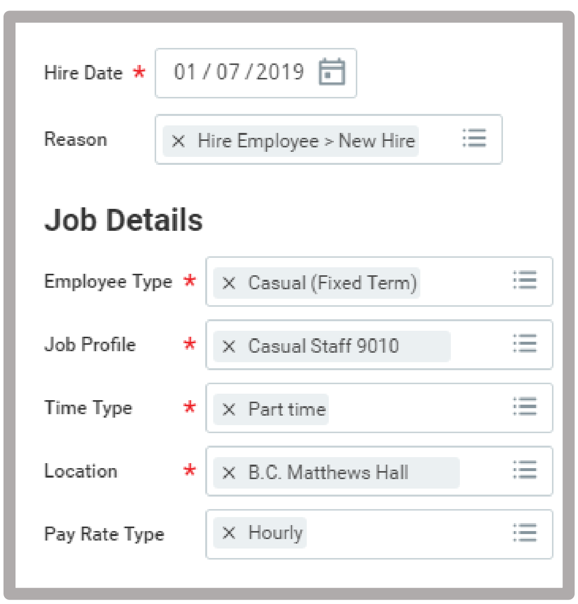
**Hint:** Leave *Source* and *Referred by* fields blank.

## ENTER THE EMPLOYEE'S JOB DETAILS

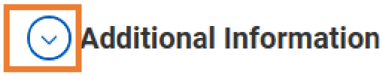
7. Enter the **Hire Date** and choose the appropriate *Reason (*New Hire if brand new, Rehire if there was a previous Workday record).
8. For *Employee Type*, type **Casual (Fixed Term)** or select it by clicking **For Current Country**.




9. In the *Job Profile* field, select or type **Casual Staff 9010,** or **Casual Staff 9011** if paid from a research account, or **9012 -Casual Staff - Proctor**, if a proctor.
10. For *Time Type*, select **Part Time.**
11. Select the building **Location** for the employee from the list.



12. Leave *Default Weekly Hours* as is and update *Scheduled Weekly Hours* with the expected number of hours per week.
13. Expand **Additional Information**.

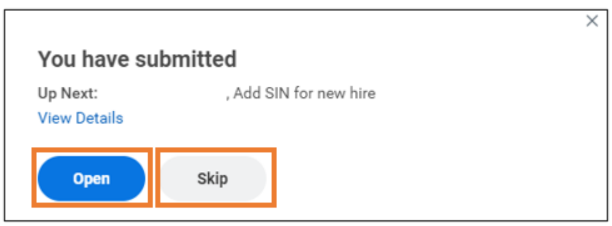



14. Update the **Job Title** to the employee's actual title.
    **Note:** *This ensures the correct casual position is selected when entering time for multiple casual positions.*
15. Enter an **End Employment Date** for the employee.
16. If this Casual employee will be paid from a research account, please provide a short description of their job details in the comment box for the Office of Research to review or attach it in the file upload section.
17. Click **Submit** to continue to enter SIN if this is a new hire (step 18) or to enter compensation details if this is a rehire (step 20).

    If this is a brand new hire:

### ENTER SOCIAL INSURANCE NUMBER

18. Click **Open** to add a Social Insurance Number (SIN) OR click **Skip** and **OK** on the next screen to skip this step and continue to step 20.

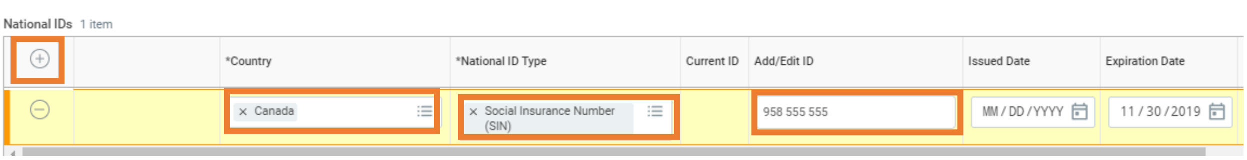



**Tip:** If you clicked out of the pop-up, the SIN task will be in your inbox to complete or skip from there. To skip it from your inbox, click the gear icon at the top right of the task and select **Skip This Task** and **OK**.

a) Click the + under the *National IDs* table to add the Canadian Social Insurance Number (SIN). Click in the empty fields to select the following:

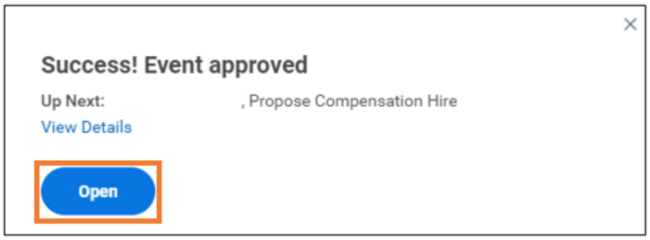
   Country – **Canada**
   National ID Type - **Social Insurance Number**
   Add/Edit ID - **9 digit Social Insurance Number**
   Issued Date - **Leave blank**
   Expiration Date - Enter if Social Insurance Number starts with a "9", otherwise leave blank

19. Click **Approve.**



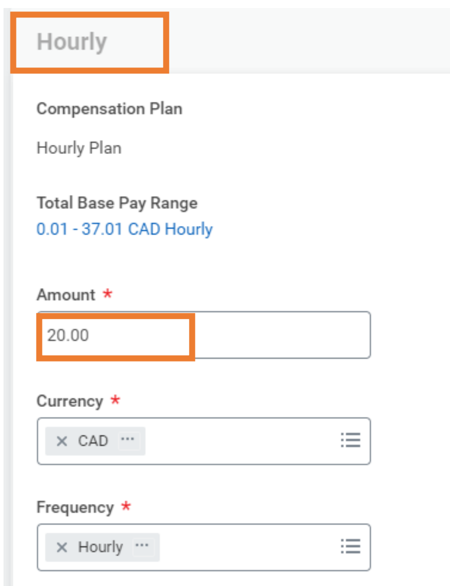
## ENTER EMPLOYEE COMPENSATION INFORMATION

20. Click **Open** to go to the Compensation screen**.**

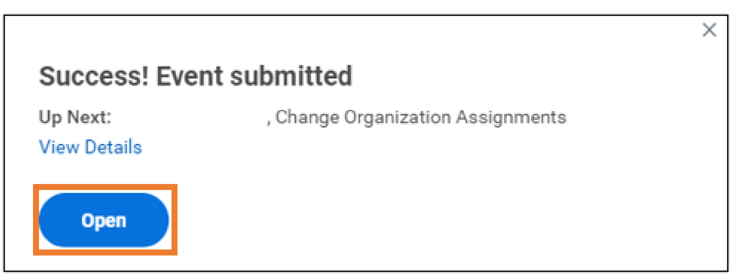



**Tip:** If you clicked out of the pop-up, the Compensation task will be in your inbox to complete from there.

21. Scroll down to the *Hourly* section and click the **edit icon**. 
22. In the *Amount* field, enter an hourly rate.



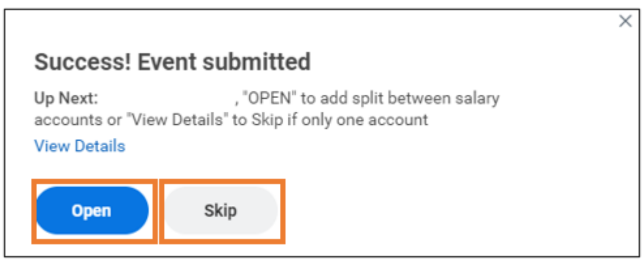

23. Click **Submit.**
24. Click **Open** to continue to update the cost center**.**



## ENTER CHANGE ORGANIZATION ASSIGNMENT

25. In the *Cost Center* section, click the **Edit** icon and enter the **work order** and **activity** for the employee in the *Cost Center* field in this format xxxxx-xxxxx xxx.


26. Click **Submit.**
27. If there is only one applicable Cost Center, click **Skip** for *Add Split Between Salary Accounts*, then **OK** to send the hire to HR for review. If there is more than one cost center, click **Open** and see the steps below.




**Tip**: Leave the reason field blank for skipped fields. If you clicked Open or clicked out of the pop-up instead of Skipping, navigate to your Workday inbox and select the gear icon (task actions) in the top right of the Assign Costing Allocation inbox item and click **Skip This Task** and then **OK** on the next screen to skip.

**If there is more than one Cost Center:**

28. Click **Open** to enter additional salary accounts.
29. Select **Worker and Position** for the *Costing Allocation Level.*
30. Click **Add.**
31. Select the + to add an additional row and enter the additional cost center into the *Worktags* field.
32. Enter the appropriate *Distribution Percent*.
33. Click **Submit**. The initiation of this hire is now complete and will go to HR for review.

**Tip:** To view the status of your hire, type the employee's name into the main Workday search bar and press enter. Make sure **All of Workday** is selected under *Categories* and click the *Hire:(employee name)* link. Click the **Process** tab on the resulting screen and scroll down the table to see what part of the process the hire is in; OR find the submitted Hire event in the Archive section of your Workday inbox and click the Process tab (items are archived for 30 days).

## HIRE A STUDENT

**Hire initiation**
- Manager
- Delegate
- Campus Partner

**Hire review - job details (dates, employee type, hours)**
Manager (if initiator is not the Manager or a delegated approver)

**Hire review - job details (dates, employee type, hours)**
Human Resources Administration (HR Ops Partner)

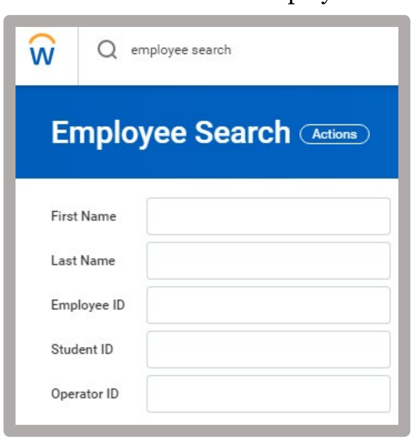
**Consolidated approval - compensation and funding sources**
- Office of Research (if paid from a research account)
- Signing authority

**Hire finalization**
Human Resources Administration (HR Ops Partner)

**Onboarding - update banking, SIN, contact information, etc.**
Employee

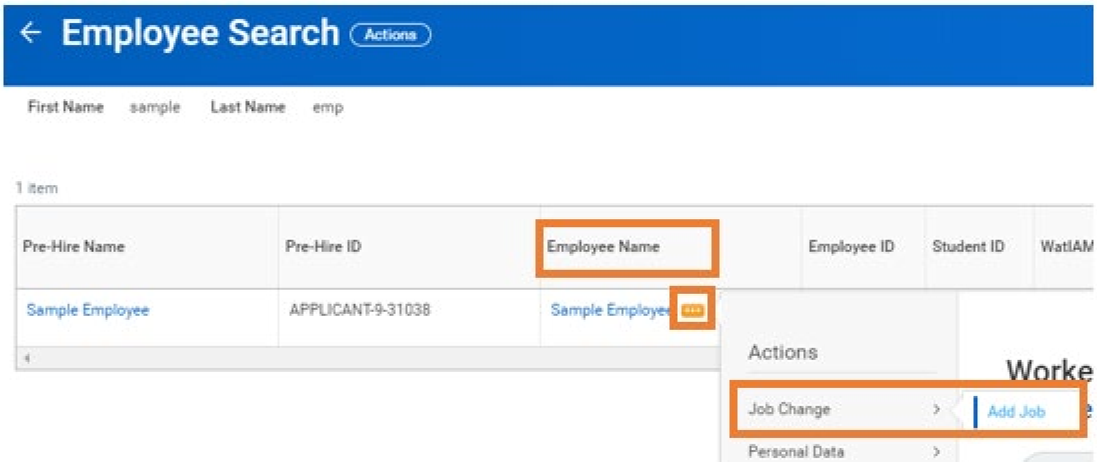
The steps outlined below will guide you through the process of hiring a co-op student, Graduate Teaching Assistant, and Graduate Research Assistant. To hire a Work Placement (WP), Engineering Undergraduate Research Internship (Eng-URI), or Undergraduate Student Research Awards (USRA) student, please view the work instructions specific to this group of student hires.

1. Type **Employee Search** into the main search bar to access the search by employee ID, student ID function to determine if the new employee exists in Workday.

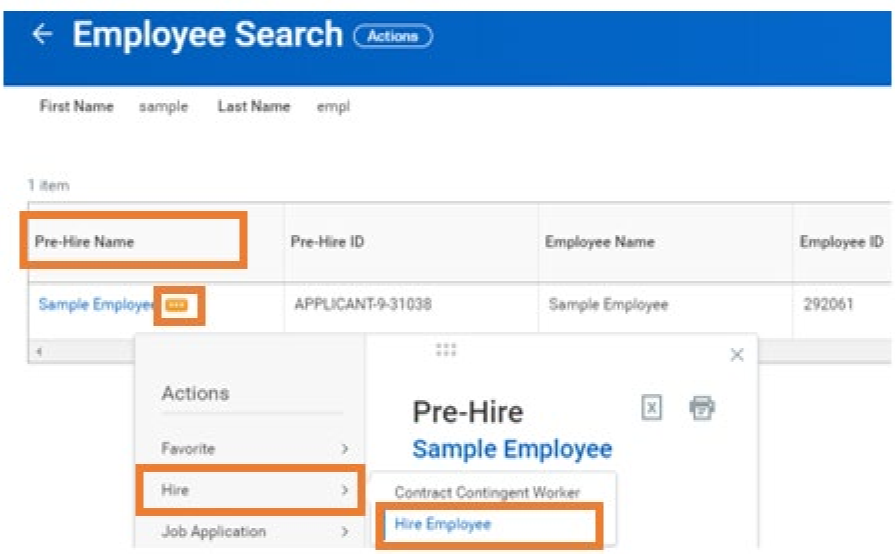



2. If their *Employee Name*:

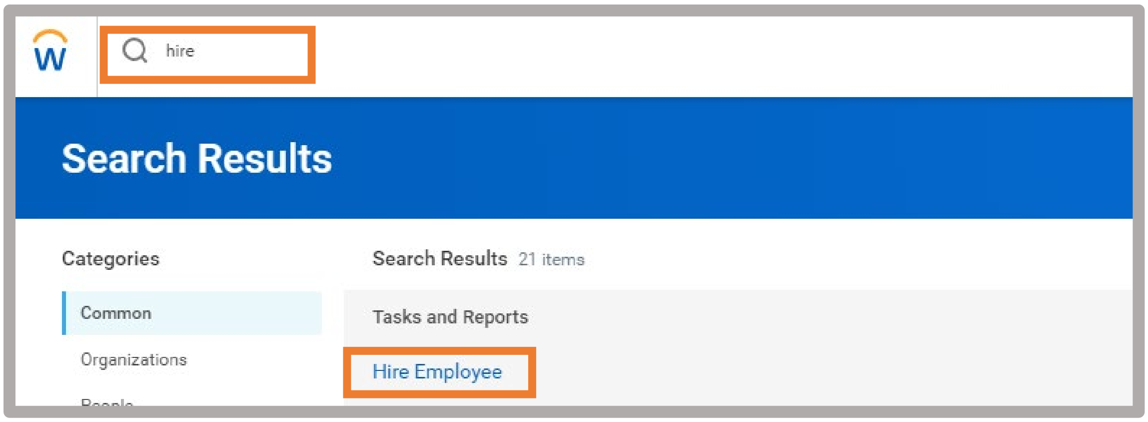
a. Appears as a hyperlink: They are an active employee – hover over the **Employee Name** to click the related actions (3 dots) and hover over Job Change to select **Add Job** and continue from **step 3** below.
**Note:** If you are a manager and this is a former employee who most recently reported to you or is a retiree, their name will appear as a hyperlink, but there will be no *Add Job* option. In this case proceed with option "b" below.



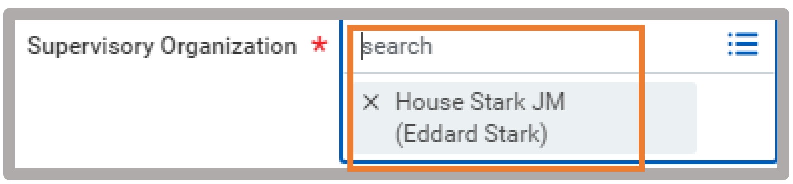

b. Appears in the search results as text, not a hyperlink: They are a former employee in Workday - hover over the **Pre-Hire Name** to click the related actions (3 dots) and select **Hire** to rehire them and continue to **step 3** below.




c. Does not appear: They are brand new to Workday – Type **Hire Employee** in the main search bar to hire them into the system and follow the steps below.



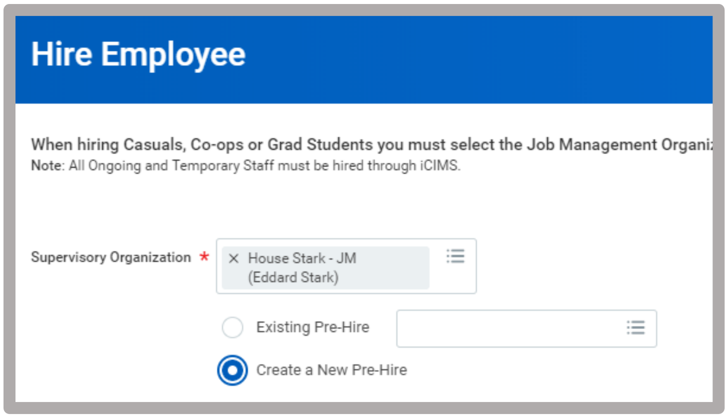

3. Type the manager name of the supervisory organization (sup org) you are hiring into, in the Supervisory Organization search field and press enter to pull up a list of available sup orgs. From the available options, select the appropriate one with 'JM' denoted in the title.




> **Note:** *JM is short for Job Management. This is used to group positions without position numbers including casual, student and non-faculty appointments (i.e. post-doctoral fellows, research associates).*

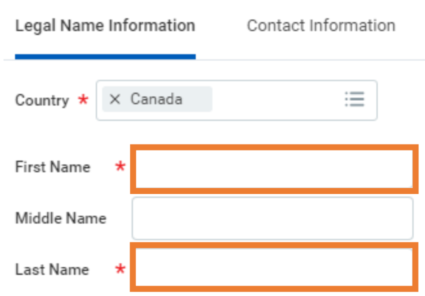
If you have not performed the *Employee Search,* please see step 2 before continuing.

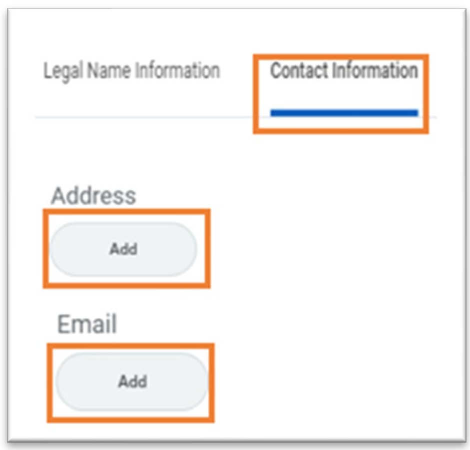
4. **If the Employee Search produced no results:**
   Select **Create a New Pre-Hire** if the employee was not found in the *Employee Search* and click **OK** to continue to the *student's contact information.*
   **If this is a rehire based off the Employee Search:**
   Their name will now be populated in the *Existing Pre-Hire field.* Click **OK** to continue to step 7 – *Enter the employee's job details.*




### ENTER THE STUDENT'S CONTACT INFORMATION

5. Enter the employee's **First** and **Last Name** and select the **Contact Information** tab to add a home address and an email address.



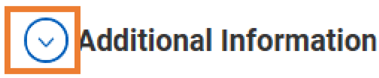

6. Click **OK** to continue to the job details.

**Hint:** Entering Source and Referred by information is optional.

### ENTER THE STUDENT'S JOB DETAILS

7. Enter the **Hire Date** and choose the appropriate *Reason* (**New Hire** if brand new, **Rehire** if there was a previous Workday record).
   **Tip**: If requesting 4 equal payments, enter the first day of the month of the applicable term.
8. Enter the appropriate *Employee Type* by selecting **For Current Country> Student (Fixed Term).**
9. In the *Job Profile* field, select or type the appropriate one from the list below:
   Co-op: **7661**
   Undergrad Teaching Assistant: **7835**
   Undergrad Research Assistant: **7836**
   Graduate Teaching Assistant: **1671**
   Graduate Research Assistant: **1672**
10. Select the appropriate **Time Type** (if 35 hours or greater, select Full Time, otherwise select Part Time).

11. Select the building **Location** for the employee from the list of **All Locations.**
12. Update **Default Hours** with the number of working hours per week to automatically adjust **Scheduled Weekly Hours** to the same amount.
    **Tip**: Updating the Default Weekly Hours will avoid proration of the salary amount, by adjusting the FTE to 100%.
13. Expand **Additional Information**.

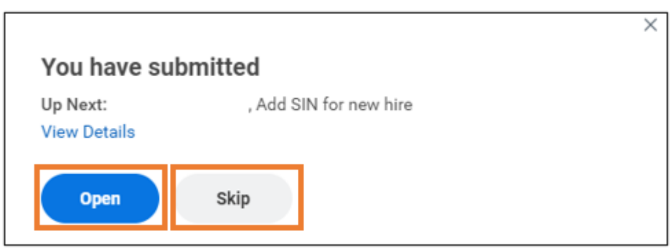



14. Enter an **End Employment Date** for the employee.
    **Tip**: If requesting 4 equal payments, enter the last day of the month of end of the term.
15. If this student employee will be paid from a research account, please provide a short description of their job details in the comment box.
16. Click **Submit** to continue to enter SIN if this is a new hire (step 17) or to enter compensation details if this is a rehire (step 19).

    If this is a brand new hire:

### ENTER SOCIAL INSURANCE NUMBER

17. Click **Open** to add a Social Insurance Number (SIN) OR click **Skip** and **OK** on the next screen to skip this step and continue to step 19.

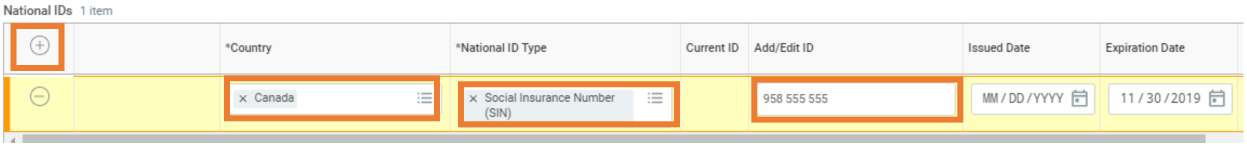



**Tip:** If you clicked Open or out of the pop-up, the SIN task will be in your inbox to complete or skip from there. To skip it from your inbox, click the gear icon at the top right of the task and select **Skip This Task** and **OK**.

a) Click the + under the *National IDs* table to add the Canadian Social Insurance Number (SIN). Click in the empty fields to select the following:

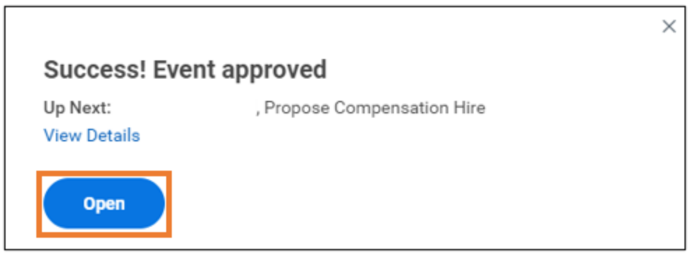
   Country – **Canada**
   National ID Type - **Social Insurance Number**
   Add/Edit ID - **9 digit Social Insurance Number**
   Issued Date - **Leave blank**
   Expiration Date - Enter if Social Insurance Number starts with a "9", otherwise leave blank

18. Click **Approve.**



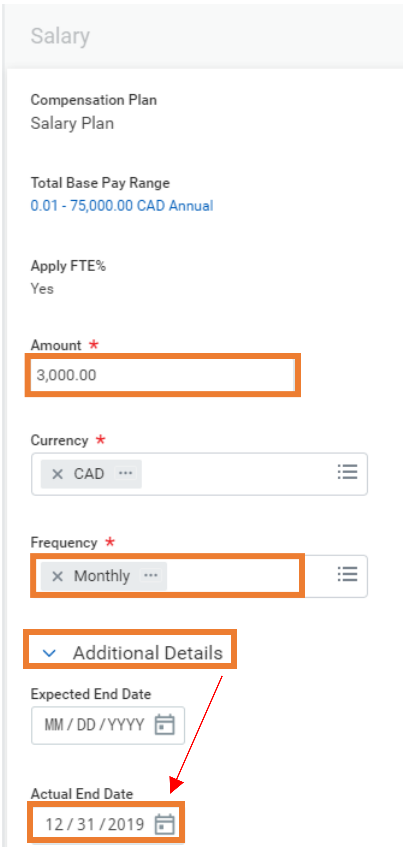

## ENTER STUDENT COMPENSATION INFORMATION

19. Click **Open** to go to the Compensation screen**.**




**Tip:** If you clicked out of the pop-up, navigate to your Workday inbox and continue the task from there.

20. In the *Salary* section, click the **Edit icon** and enter a monthly salary in the *Amount* field and select **Monthly** in the *Frequency* field.
21. Click Additional Details underneath *Frequency* to expand the fields.
22. Enter the Actual End Date to be the same as the End Employment Date (i.e. the end date that was entered on the job details screen).

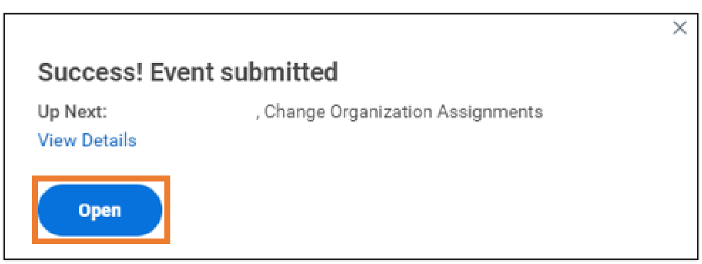




23. Click **Submit** to continue to the account entry section and follow the steps below.

## ENTER CHANGE ORGANIZATION ASSIGNMENT

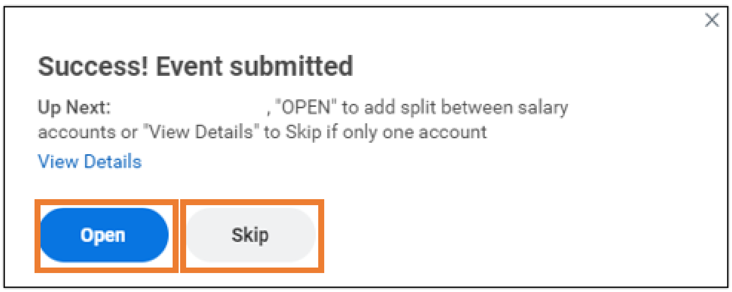
24. Click **Open.**




**Tip:** If you clicked out of the pop-up, navigate to your Workday inbox and continue the task from there.

25. In the *Cost Center* section, click the **Edit** icon and enter the **work order** and **activity** for the employee in the *Cost Center* field in this format xxxxx-xxxxx xxx.

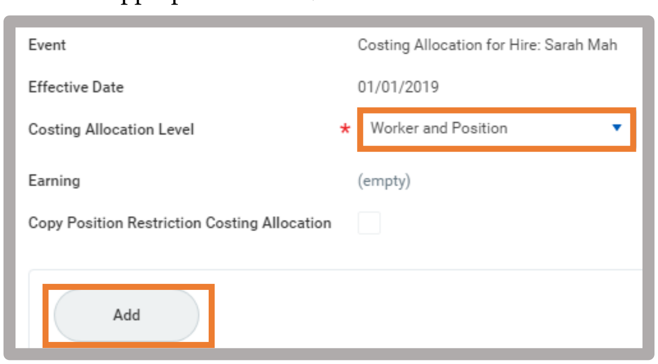

26. Click **Submit.**
27. If there is only one applicable Cost Center, click **Skip** for *Add Split Between Salary Accounts*, then **OK** to send the hire to HR for review. If there is more than one cost center, click **Open** and see the steps below.

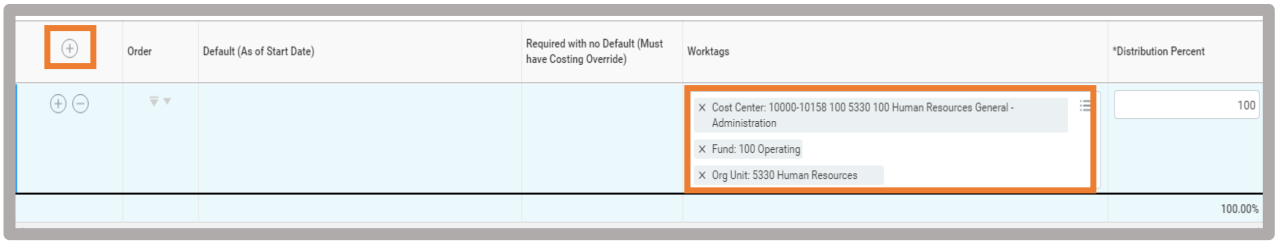



**Tip:** Leave the reason field blank for skipped fields. If you clicked Open or clicked out of the pop-up instead of Skipping, navigate to your Workday inbox and select the gear icon (task actions) in the top right of the Assign Costing Allocation inbox item and click **Skip This Task** and then **OK** on the next screen to skip.

**If there is more than one Cost Center:**

28. Click **Open** to enter additional salary accounts.
29. For *Costing Allocation Level,* select **Worker and Position**.
30. Click **Add.**
31. Select the + button to add an additional row and enter the additional cost center to the *Worktags* field.
32. Enter the appropriate **Distribution Percent.**

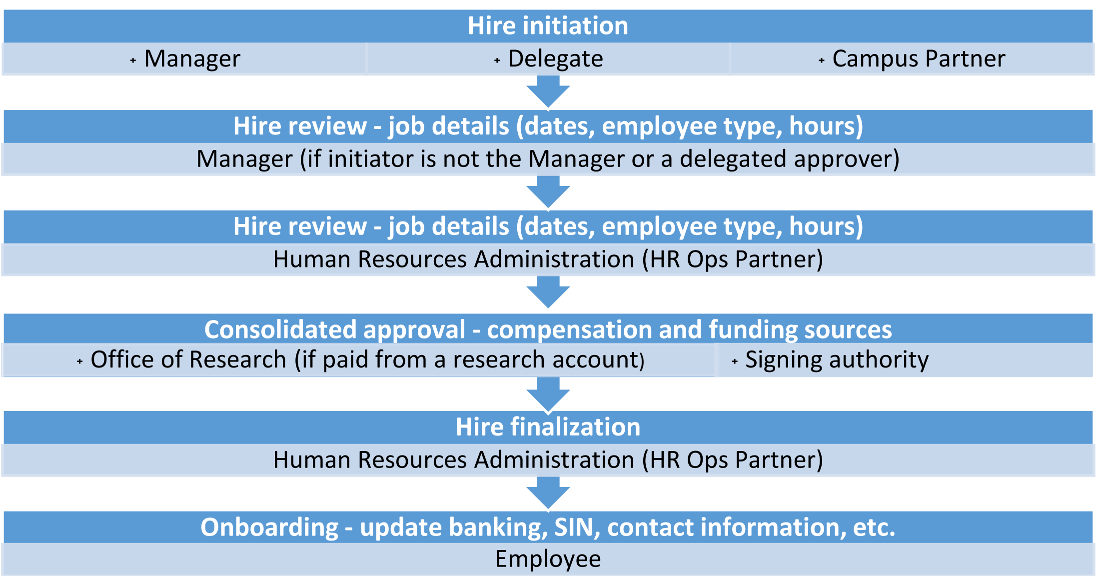





33. Click **Submit** and **Done.** The initiation of this hire is now complete and will go to HR for review.

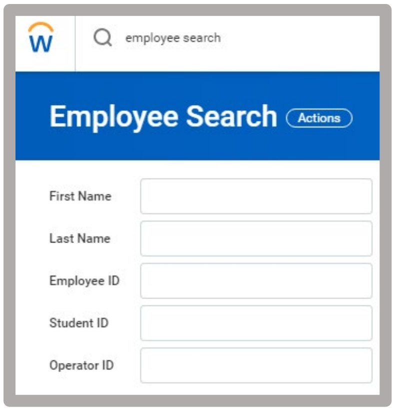
    **Tip:** To view the status of your hire, type the employee's name into the main Workday search bar and press enter. Make sure **All of Workday** is selected under *Categories* and click the *Hire:(employee name)* link. Click the **Process** tab on the resulting screen and scroll down the table to see what part of the process the hire is in; OR find the submitted Hire event in the Archive section of your Workday inbox and click the Process tab (items are archived for 30 days).

## HIRE A WORK PLACEMENT STUDENT

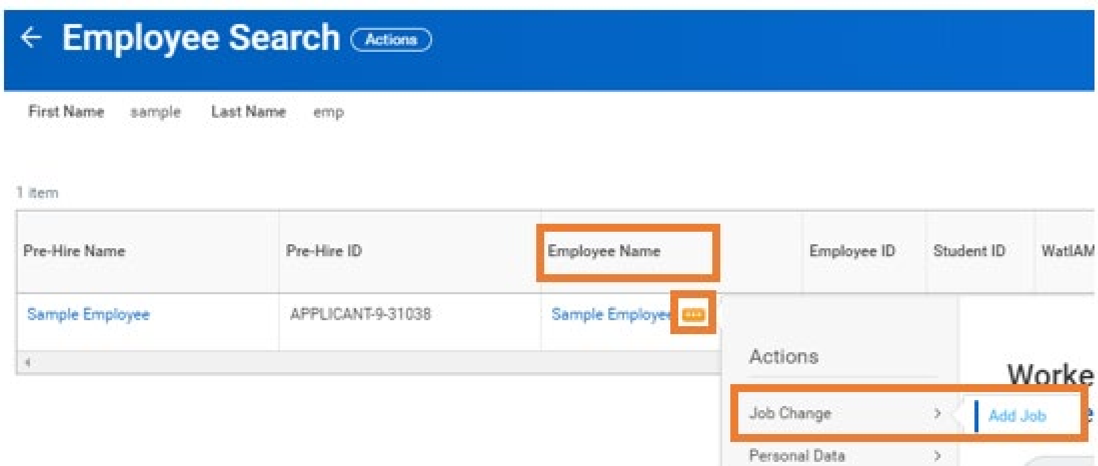



The steps outlined below will guide you through the process of hiring a Work Placement (WP) student.

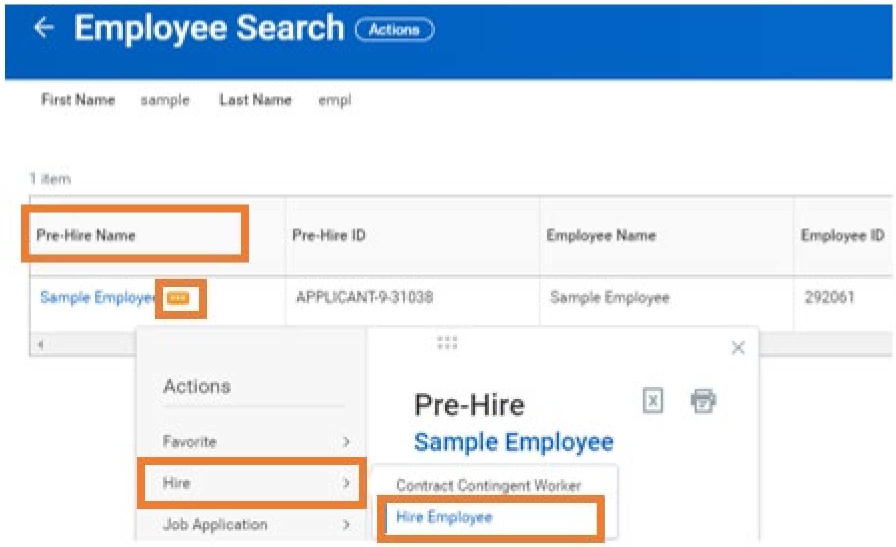
1. Type **Employee Search** into the main search bar to access the search by employee ID, student ID search function to determine if the new employee exists in Workday.



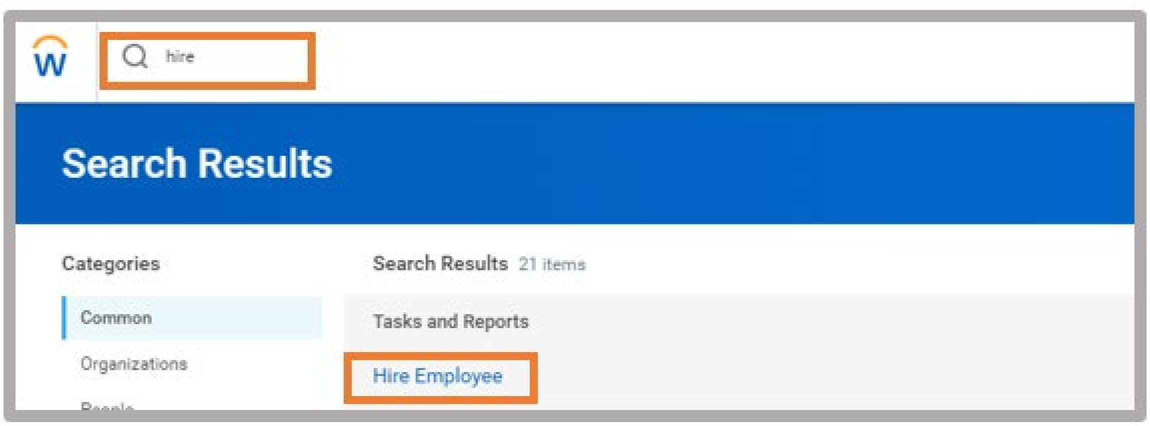

2. If their *Employee Name*:
    a. Appears as a hyperlink: They are an active employee – hover over the **Employee Name** to click the related actions (3 dots) and hover over Job Change to select **Add Job** and continue from **step 3** below.
    **Note:** If you are a manager and this is a former employee who most recently reported to you or is a retiree, their name will appear as a hyperlink, but there will be no *Add Job* option. In this case proceed with option "b" below.



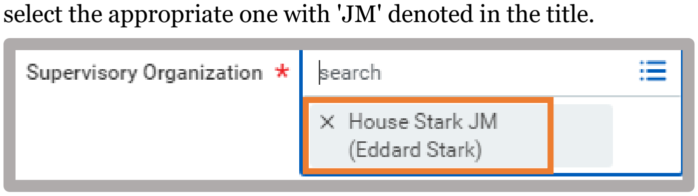

    b. Appears in the search results as text, not a hyperlink: They are a former employee in Workday - hover over the **Pre-Hire Name** to click the related actions (3 dots) and select **Hire** to rehire them and continue to **step 3** below.




c. Does not appear: They are brand new to Workday – Type **Hire Employee** in the main search bar to hire them into the system and follow the steps below.



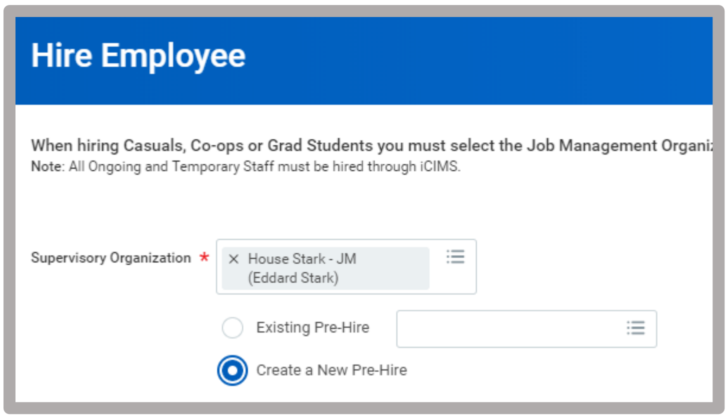

3. Type the manager name of the supervisory organization (sup org) you are hiring into, in the Supervisory Organization search field and press enter to pull up a list of available sup orgs. From the available options, select the appropriate one with 'JM' denoted in the title.




**Note:** *JM is short for Job Management. This is used to group positions without position numbers including casual and student hires.*

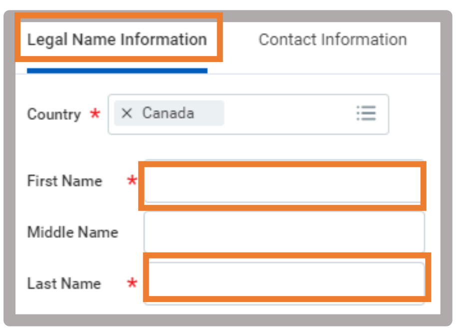
If you have not performed the *Employee Search*, please see step 2 before continuing.

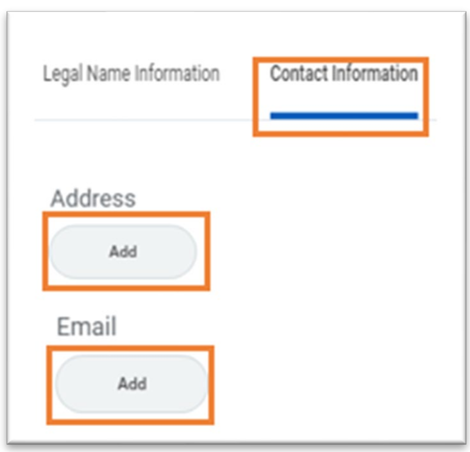
4. **If the Employee Search produced no results:**
Select **Create a New Pre-Hire** if the employee was not found in the Employee Search and click **OK** to continue to the *employee's contact information*.
**If this is a rehire based off the Employee Search:**
Their name will now be populated in the **Existing Pre-Hire** field. Click **OK** to continue to step 7 – *Enter the employee's job details*.




## ENTER THE EMPLOYEE'S CONTACT INFORMATION

5. Enter the employee's **First** and **Last Name** and select the **Contact Information** tab to add a home address and an email address.

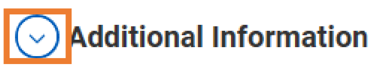



6. Click **OK** to continue to the job details.

## ENTER THE EMPLOYEE'S JOB DETAILS

7. Enter the **Hire Date** and choose the appropriate *Reason* (**New Hire** if brand new, **Rehire** if there was a previous Workday record).
   **Tip**: If requesting 4 equal payments, enter the first day of the month of the applicable term.
8. Enter the appropriate *Employee Type* by selecting **For Current Country> Student (Fixed Term).**
9. In the *Job Profile* field, select or type **Co-op 7661.**
10. Select the appropriate **Time Type** (if 35 hours or greater, select Full Time, otherwise select Part Time).
11. Select the building **Location** for the employee from the list of **All Locations** or type the abbreviation.
12. Update **Default Hours** with the number of working hours per week to automatically adjust **Scheduled Weekly Hours** to the same amount.
    **Tip**: Updating the Default Weekly Hours will avoid proration of the salary amount, by adjusting the FTE to 100%.
13. Expand **Additional Information** to enter the employment end date.

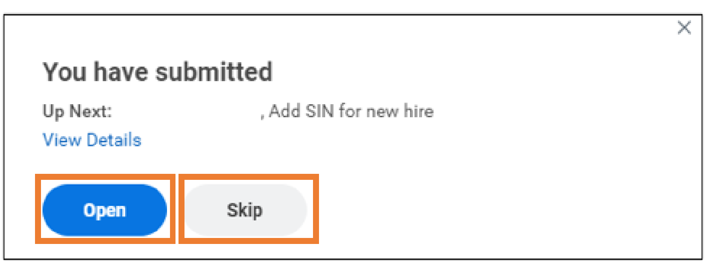



14. Enter an **End Employment Date** for the employee.
    **Tip**: If requesting 4 equal payments, enter the last day of the month of end of the term.
15. Enter a comment as to when the Work Placement Application form was sent to Student Awards and Financial Aid (SAFA).
16. If this student employee will be paid from a research account, please provide a short description of their job details in the comment box.
17. Click **Submit** to continue to enter SIN if this is a new hire (step 18) or to enter compensation details if this is a rehire (step 20).

    If this is a brand new hire:

## ENTER SOCIAL INSURANCE NUMBER

18. Click **Open** to add a Social Insurance Number (SIN) OR click **Skip** and **OK** on the next screen to skip this step and continue to step 20.




**Tip:** If you clicked Open or out of the pop-up, the SIN task will be in your inbox to complete or skip from there. To skip it from your inbox, click the gear icon at the top right of the task and select **Skip This Task** and **OK**.

a) Click the + under the *National IDs* table to add the Canadian Social Insurance Number (SIN). Click in the empty fields to select the following:

Country – **Canada**

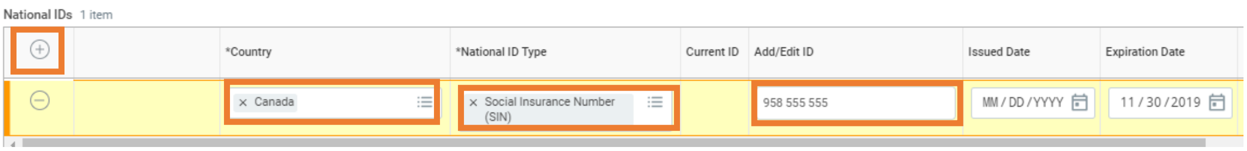
National ID Type - **Social Insurance Number**

Add/Edit ID - **9 digit Social Insurance Number**

Issued Date - **Leave blank**

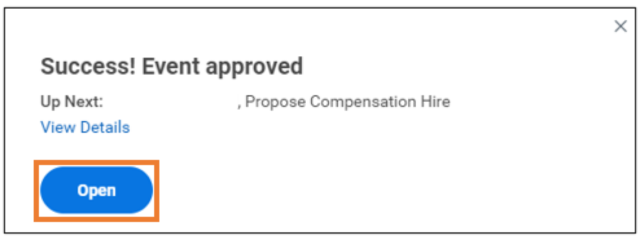
Expiration Date - Enter if Social Insurance Number starts with a “9”, otherwise leave blank

19. Click **Approve.**



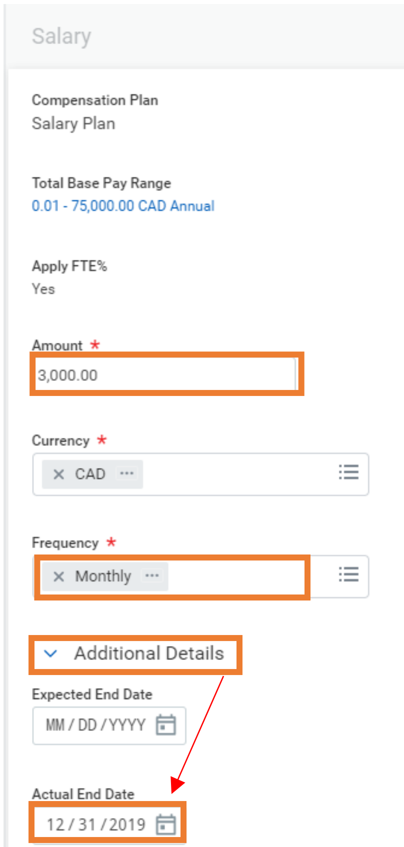

## ENTER EMPLOYEE COMPENSATION INFORMATION

20. Click **Open** to go to the compensation screen**.**




**Tip:** If you clicked out of the pop-up, navigate to your Workday inbox and continue the task from there.

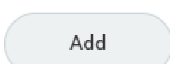
21. Skip to step 24 if no top up is being provided, otherwise, if the department is paying a top up, enter the total top up amount (i.e. $625 from one account+$1200 from another account = $1825 -> enter this total top up amount) in the *Salary* section and for *Frequency*, select **Monthly**.
22. Click **Additional Details** underneath *Frequency* to expand the fields.
23. Enter the **Actual End Date** to be the same as the End Employment Date (i.e. the end date that was entered on the job details screen).





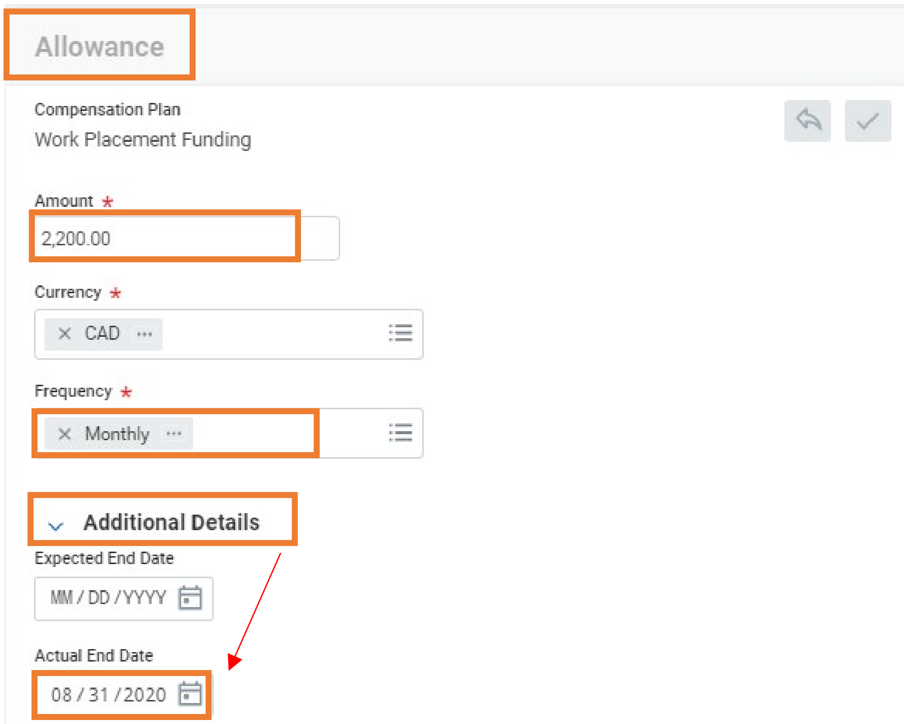
**Tip:** The payments will be split into the appropriate accounts in the Assign Multiple Funding Sources section (up next).

24. If no top up is being provided, click the **X** in the Salary section and **Delete** to close it. 
25. Scroll down to click **Add** in the *Allowance* section.




26. Click in the *Compensation Plan* field and select **All Compensation Plans** to choose *Work Placement Funding*.
27. In the amount field, enter $2200.
28. Click *Additional Details* underneath *Frequency* to expand the fields.
29. Enter the **Actual End Date** to be the same as the End Employment Date (i.e. the end date that was entered on the job details screen).

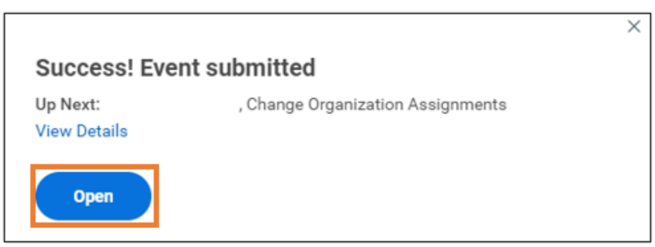
**Tip:** Vacation percentage will be automatically calculated. Do not add it here.




30. Click **Submit** to continue on to the account entry screen (Change Organization Assignment).

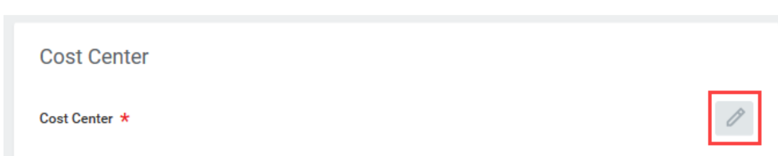
## ENTER CHANGE ORGANIZATION ASSIGNMENT

31. Click **Open.**

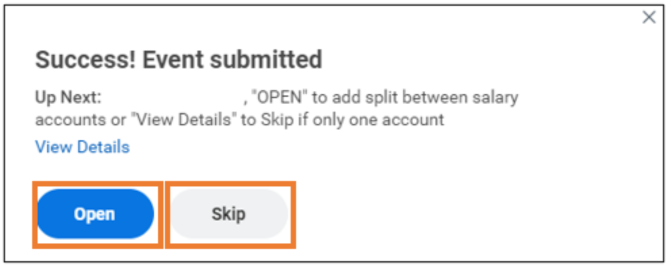



**Tip:** If you clicked out of the pop-up, navigate to your Workday inbox and continue the task from there.

32. Click the **Edit** icon for *Cost Center* and enter the **work placement** account information as 10000-10738 100.



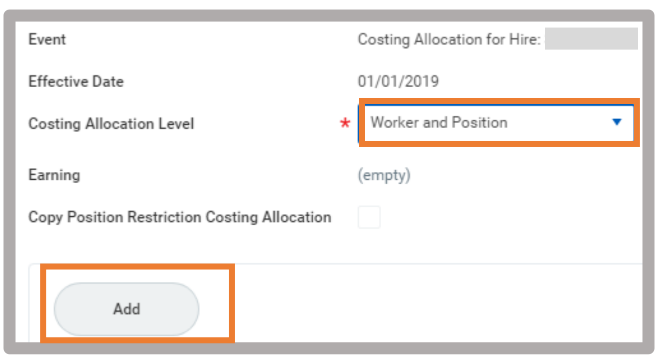
33. Click **Submit.**
34. Click **Skip** for *Add Split Between Salary Accounts* if only being paid the work placement funding and click **OK** and **Done** to complete the hire OR if there is a department top up, continue to next step.



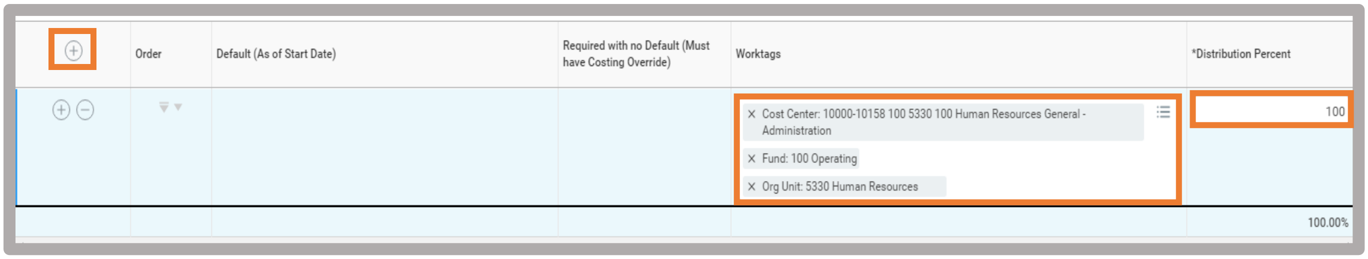

**Tip:** If you clicked Open or clicked out of the pop-up instead of Skipping, navigate to your Workday inbox and select the gear icon (task actions) in the top right of the Assign Costing Allocation inbox item and click **Skip This Task** and then **OK** on the next screen to skip.

**If there is a department top up:**

35. Click **Open** to enter the department top up account.
36. For *Costing Allocation Level, s*elect **Worker and Position**.
37. Click **Add.**
38. In the resulting table, enter the **department** work order and activity in the **Worktags** field. If only entering one salary account, click **Submit** and **Done** to send the hire to HR for review.
If more than one salary account needs to be added, continue to the next step.
**Tip**: This screen is for the department top up accounts only. Do not enter the Work Placement account on this screen.
39. If more than one account for the department salary amount, click the + in the table to add a row and enter the additional work order in the **Worktags** field and press enter.
40. Enter the appropriate **Distribution Percent.**



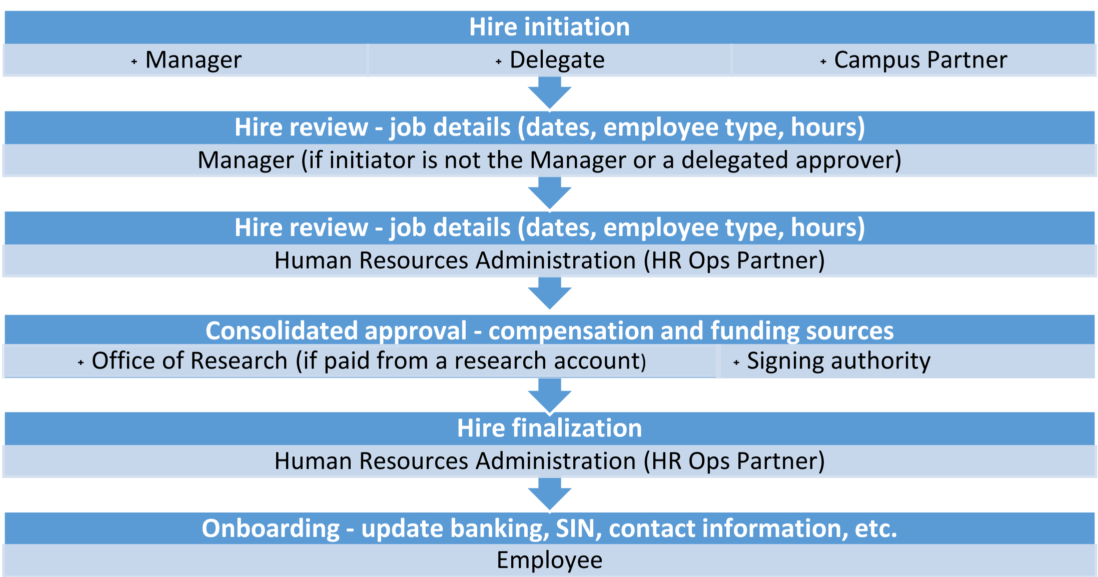

**Tip:** To determine the distribution percentage, add together the department amounts (i.e. Dean and faculty payments) and divide each individual amount by the combined total (e.g. if $625 from the Dean's account and $1200 from faculty account it would be $625/$1825 = 34% for Dean's portion, and the other account would be the remaining 66%).




41. Click **Submit** and **Done.** The initiation of this hire is now complete and will go to HR for review.

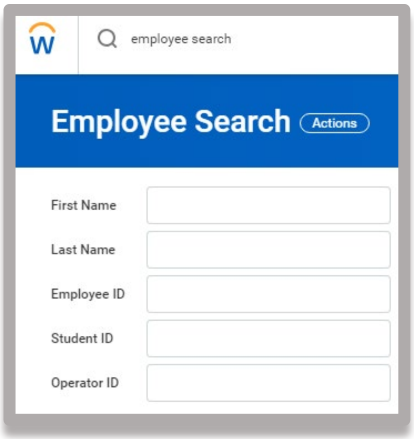
    **Tip:** To view the status of your hire, type the employee's name into the main Workday search bar and press enter. Make sure **All of Workday** is selected under *Categories* and click the *Hire:(employee name)* link. Click the **Process** tab on the resulting screen and scroll down the table to see what part of the process the hire is in; OR find the submitted Hire event in the Archive section of your Workday inbox and click the Process tab (items are archived for 30 days).

## HIRE AN ENGINEERING URI STUDENT

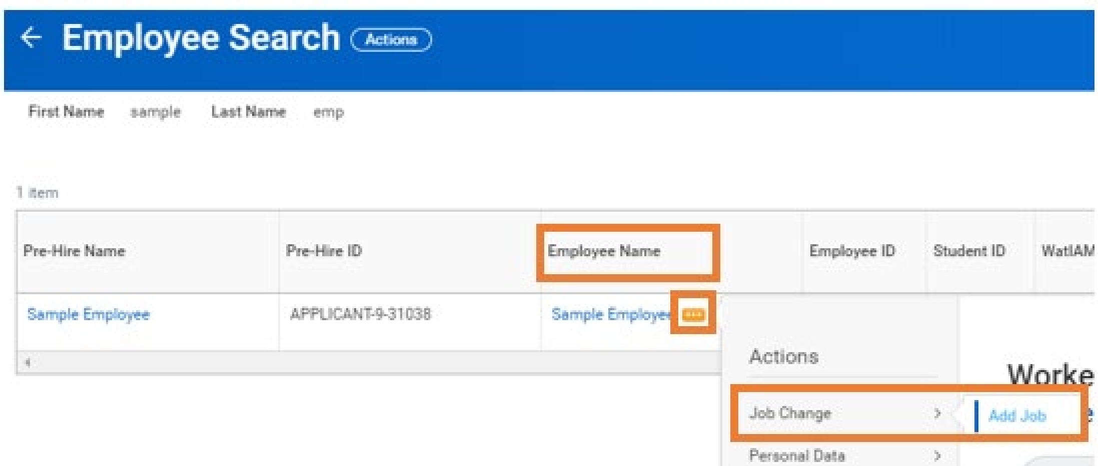



The steps outlined below will guide you through the process of hiring an Engineering Undergraduate Research Internship (Eng-URI) student. **This process is to be used by the Faculty of Engineering only.** If the student is receiving Dean's Office Top Up funding *without* the Eng-URI program funding, please proceed with the Hire a Student user guide instead.

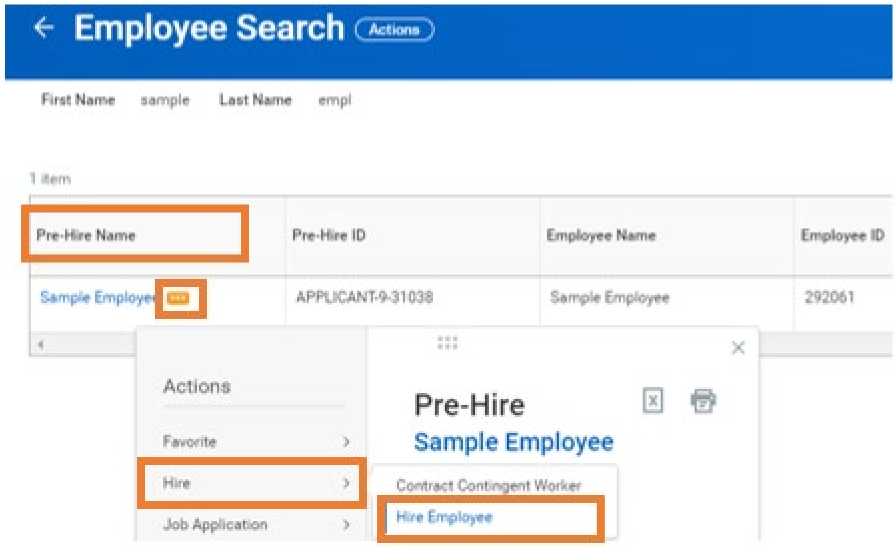
1. Type **Employee Search** into the main search bar to access the search by employee ID, student ID search function to determine if the new employee exists in Workday.



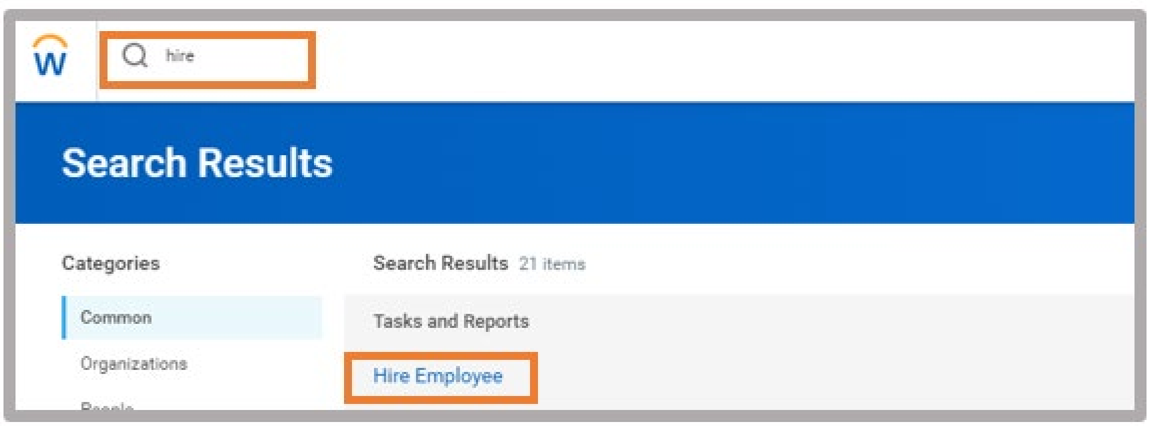

2. If their *Employee Name*:
    a. Appears as a hyperlink: They are an active employee – hover over the **Employee Name** to click the related actions (3 dots) and hover over Job Change to select **Add Job** and continue from **step 3** below.
    **Note:** If you are a manager and this is a former employee who most recently reported to you or is a retiree, their name will appear as a hyperlink, but there will be no *Add Job* option. In this case proceed with option "b" below.



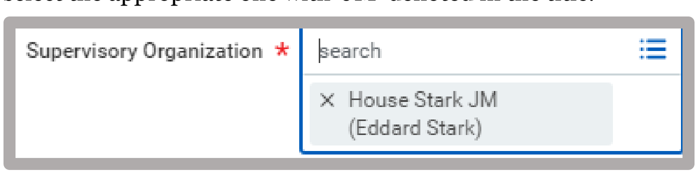

    b. Appears in the search results as text, not a hyperlink: They are a former employee in Workday - hover over the **Pre-Hire Name** to click the related actions (3 dots) and select **Hire** to rehire them and continue to **step 3** below.




c. Does not appear: They are brand new to Workday – Type **Hire Employee** in the main search bar to hire them into the system and follow the steps below.




3. Type the manager name of the supervisory organization (sup org) you are hiring into, in the Supervisory Organization search field and press enter to pull up a list of available sup orgs. From the available options, select the appropriate one with 'JM' denoted in the title.




**Note:** *JM is short for Job Management. This is used to group positions without position numbers including casual and student hires.*

If you have not performed the *Employee Search*, please see step 2 before continuing.

4. **If the Employee Search produced no results:**

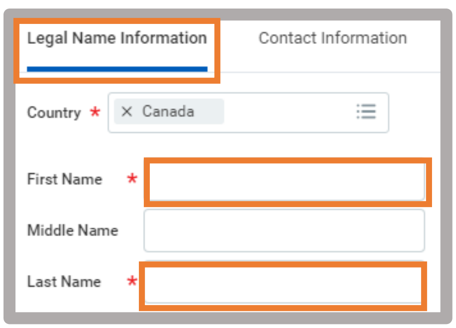
   Select **Create a New Pre-Hire** if the employee was not found in the *Employee Search* and click **OK** to continue to the *employee's contact information*.

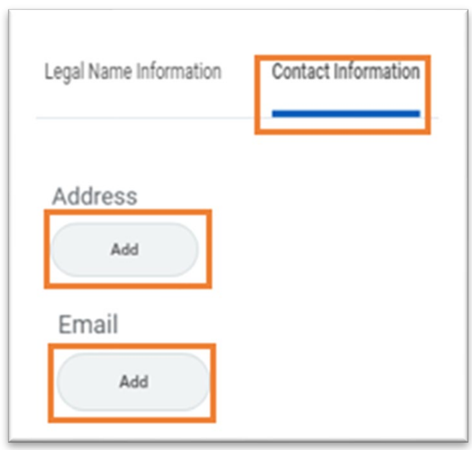
   **If this is a rehire based off the Employee Search:**

   Their name will now be populated in the **Existing Pre-Hire** field. Click **OK** to continue to step 7 – *Enter the employee's job details*.

### ENTER THE EMPLOYEE'S CONTACT INFORMATION

5. Enter the employee's **First** and **Last Name** and select the **Contact Information** tab to add a home address and an email address.




6. Click **OK** to continue to the job details.

## ENTER THE EMPLOYEE'S JOB DETAILS

7. Enter the **Hire Date** and choose the appropriate *Reason (***New Hire** if brand new, **Rehire** if there was a previous Workday record).

   **Tip**: If requesting 4 equal payments, enter the first day of the month of the applicable term.
8. Enter the *Employee Type* by selecting **For Current Country> Student (Fixed Term).**
9. In the *Job Profile* field, select or type Eng Undergrad Research Intern (Eng-URI) **7663**.
10. Select the appropriate **Time Type** (if 35 hours or greater, select Full Time, otherwise select Part Time).
11. Select the building **Location** for the employee from the list of **All Locations** or type the abbreviation.
12. Update **Default Hours** with the number of working hours per week to automatically adjust **Scheduled Weekly Hours** to the same amount.

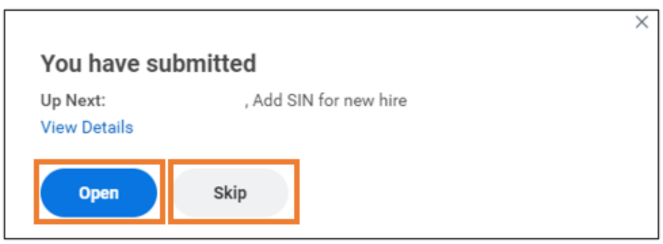
    **Tip**: Updating the Default Weekly Hours will avoid proration of the salary amount, by adjusting the FTE to 100%.
13. Expand **Additional Information** to enter the employment end date.


14. Enter an **End Employment Date** for the employee.
    **Tip**: If requesting 4 equal payments, enter the last day of the month of end of the term.
15. If this student employee will be paid from a research account, please provide a short description of their job details in the comment box.
16. Click **Submit** to continue to enter SIN if this is a new hire (step 17) or to enter compensation details if this is a rehire (step 19).

    If this is a brand new hire:

### ENTER SOCIAL INSURANCE NUMBER

17. Click **Open** to add a Social Insurance Number (SIN) OR click **Skip** and **OK** on the next screen to skip this step and continue to step 19.

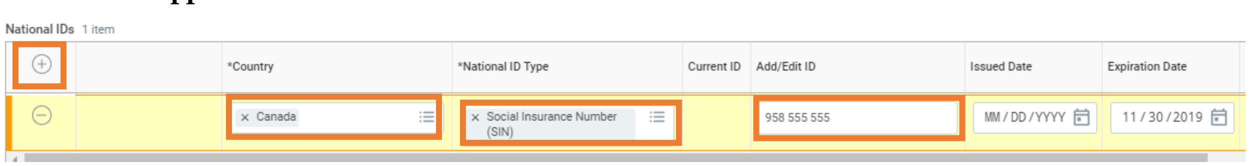



**Tip:** If you clicked Open or out of the pop-up, the SIN task will be in your inbox to complete or skip from there. To skip it from your inbox, click the gear icon at the top right of the task and select **Skip This Task** and **OK**.

a) Click the + under the *National IDs* table to add the Canadian Social Insurance Number (SIN). Click in the empty fields to select the following:

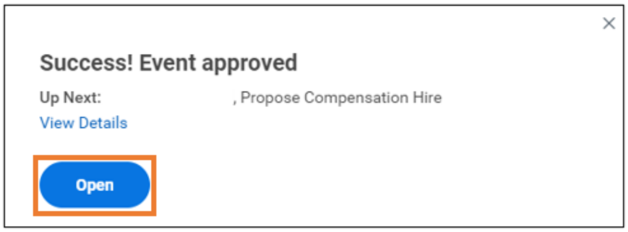
   Country – **Canada**
   National ID Type - **Social Insurance Number**
   Add/Edit ID - **9 digit Social Insurance Number**
   Issued Date - **Leave blank**
   Expiration Date - Enter if Social Insurance Number starts with a "9", otherwise leave blank

18. Click **Approve.**



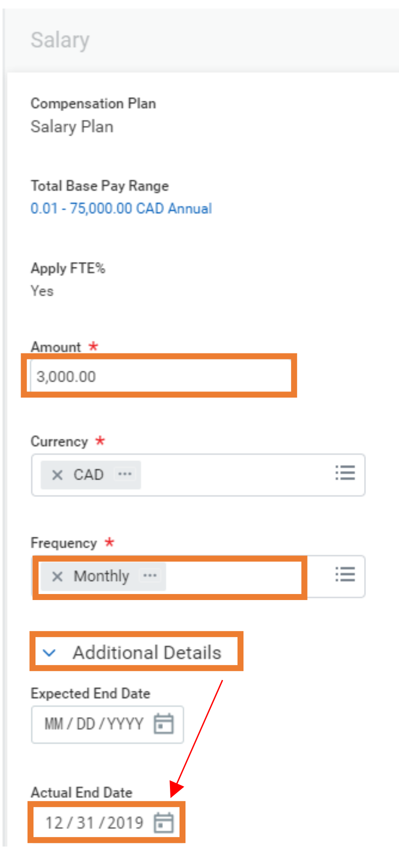

### ENTER EMPLOYEE COMPENSATION INFORMATION

19. Click **Open** to go to the compensation screen**.**



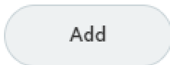

**Tip:** If you clicked out of the pop-up, navigate to your Workday inbox and continue the task from there.

20. In the *Salary* section, enter the total salary top up amount that is *not* including the Eng-URI or Dean's Top Up. *Frequency* should default to **Monthly.**
    **Note:** If receiving a salary of $1800 paid by two different work orders, enter the total $1800 in the amount field -> the salary will be split into the appropriate accounts in the multiple funding source step.
21. Click **Additional Details** underneath *Frequency* to expand the fields.
22. Enter the **Actual End Date** to be the same as the End Employment Date (i.e. the end date that was entered on the job details screen).

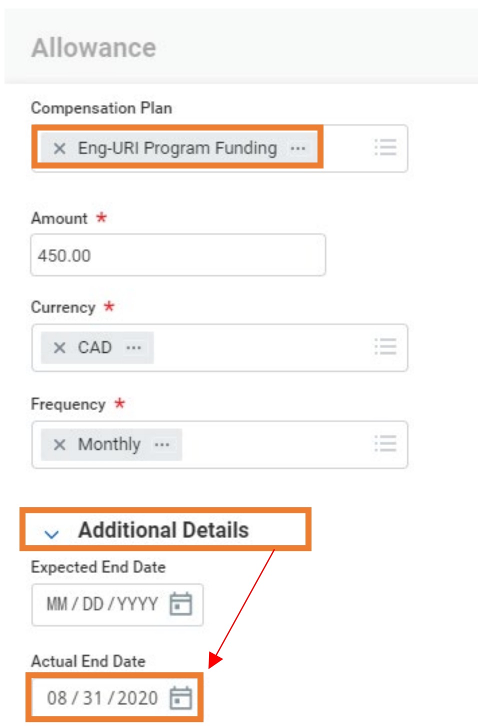




23. Scroll down to click **Add** in the *Allowance* section.



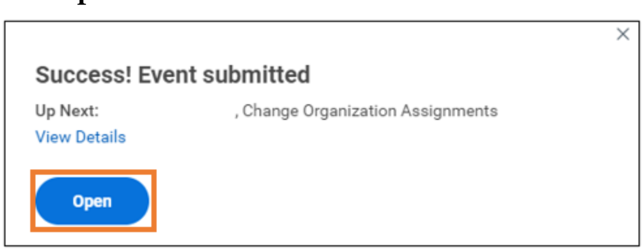

24. Click in the *Compensation Plan* field and select **All Compensation Plans** to choose *Eng-URI Program Funding*.
25. The amount field will populate to $450.
26. Click **Additional Details** underneath *Frequency* to expand the fields.
27. Enter the **Actual End Date** to be the same as the End Employment Date (i.e. the end date that was entered on the job details screen).




28. Repeat steps 23-27 to add the **Eng Dean's Office Top Up** allowance if applicable.
29. Click **Submit** to continue on to the account entry screen (Change Organization Assignment).

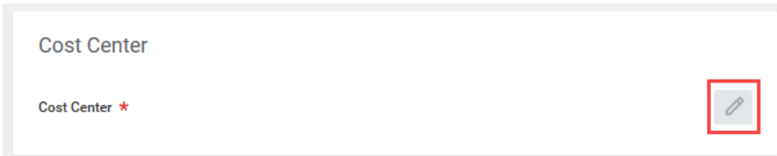
### ENTER CHANGE ORGANIZATION ASSIGNMENT

30. Click **Open.**



**Tip:** If you clicked out of the pop-up, navigate to your Workday inbox and continue the task from there.

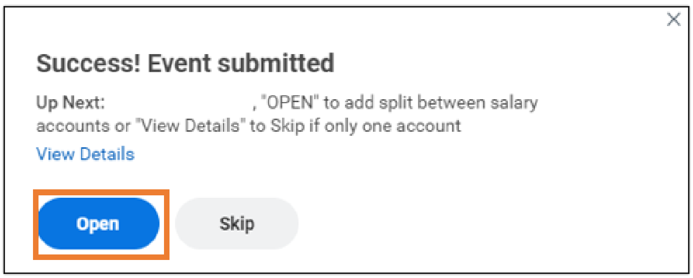
31. In the *Cost Center* section, click the **Edit** icon and enter the Eng-URI account information as follows: 10021-10174 801.




32. Click **Submit.**

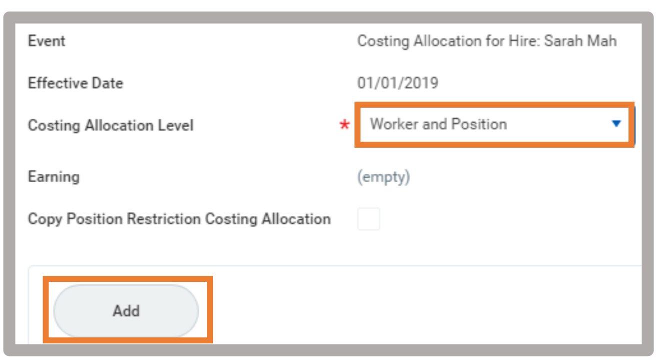
**Note:** The account information for the Dean's top up allowance plan is hard coded into the system and does not need to be entered.

33. Click **Open** to enter the department salary top up account(s).




**Tip:** If you clicked out of the pop-up, navigate to your Workday inbox and continue the task from there.

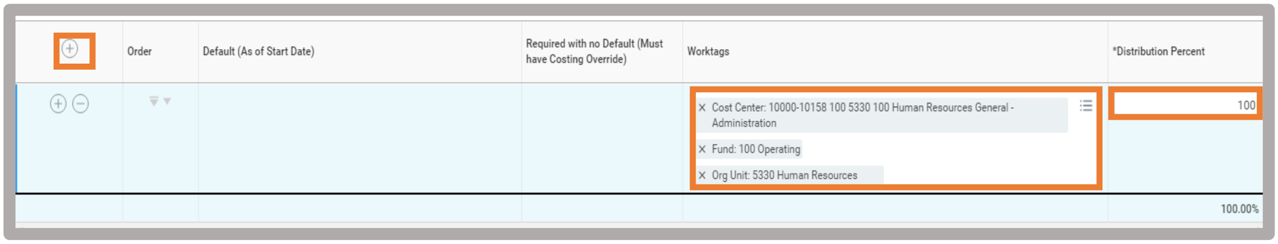
34. For *Costing Allocation Level,* select **Worker and Position.**




35. Click **Add.**
36. In the resulting table, enter the **department** (salary top up) work order and activity in the **Worktags** field of the first row. If only entering one salary account, click **Submit** and **Done** to send the hire to HR for review. If more than one salary account needs to be added, continue to the next step.

**Tip**: This screen is for the department top up accounts only. Do not enter the Eng-URI or Dean's top up account on this screen.

37. If more than one account for the department salary amount, click the + in the table to add a row to enter any additional accounts as applicable.
38. Enter the appropriate **Distribution Percent.**




39. Click **Submit** and **Done.** The hire is now complete and will go to HR for review.

**Tip**: To view the status of your hire, type the employee's name into the main Workday search bar and press enter. Make sure All of Workday is selected under *Categories* and click the *Hire:(employee name)* link. Click the Process tab on the resulting screen and scroll down the table to see what part of the process the hire is in; OR find the submitted Hire event in the Archive section of your Workday inbox and click the Process tab (items are archived for 30 days).

## HIRE A USRA STUDENT

**Hire initiation**
- Manager
- Delegate
- Campus Partner

**Hire review - job details (dates, employee type, hours)**
Manager (if initiator is not the Manager or a delegated approver)

**Hire review - job details (dates, employee type, hours)**
Human Resources Administration (HR Ops Partner)

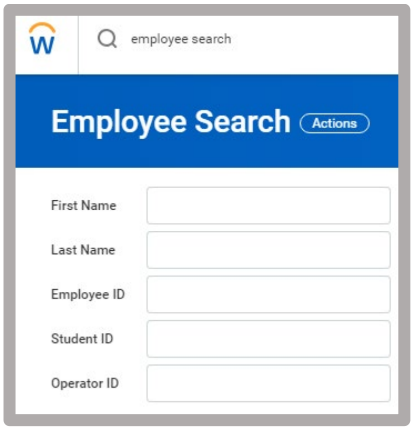
**Consolidated approval - compensation and funding sources**
- Office of Research (if paid from a research account)
- Signing authority

**Hire finalization**
Human Resources Administration (HR Ops Partner)

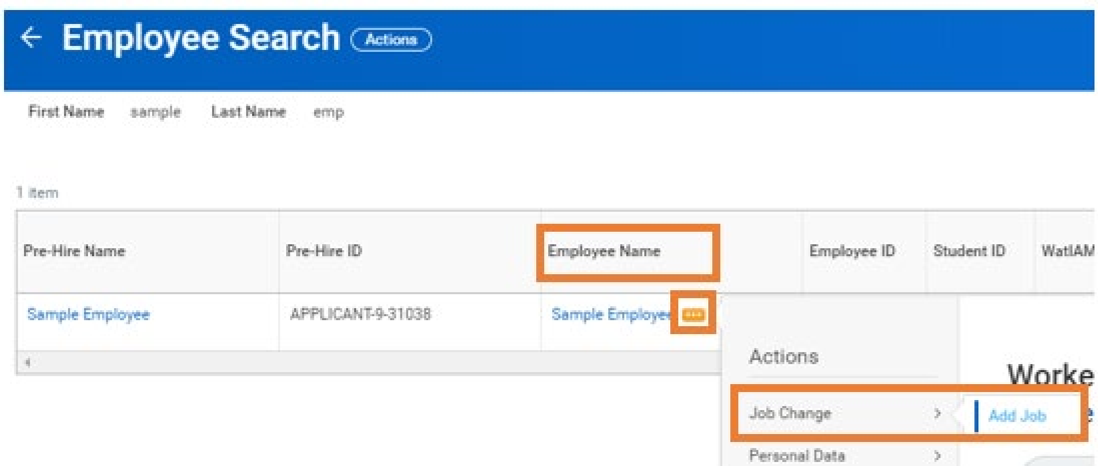
**Onboarding - update banking, SIN, contact information, etc.**
Employee

The steps outlined below will guide you through the process of hiring an Undergraduate Student Research Awards (USRA) student.

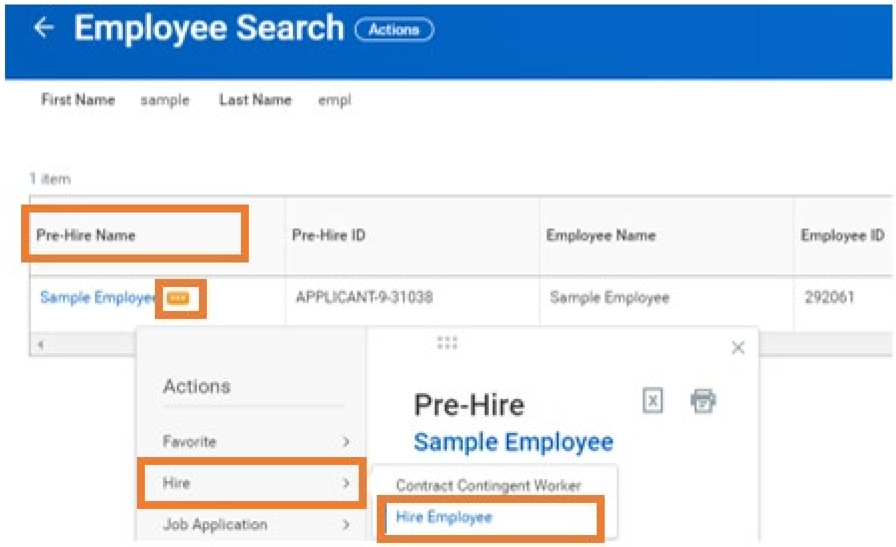
1. Type **Employee Search** into the main search bar to access the search by employee ID, student ID search function to determine if the new employee exists in Workday.



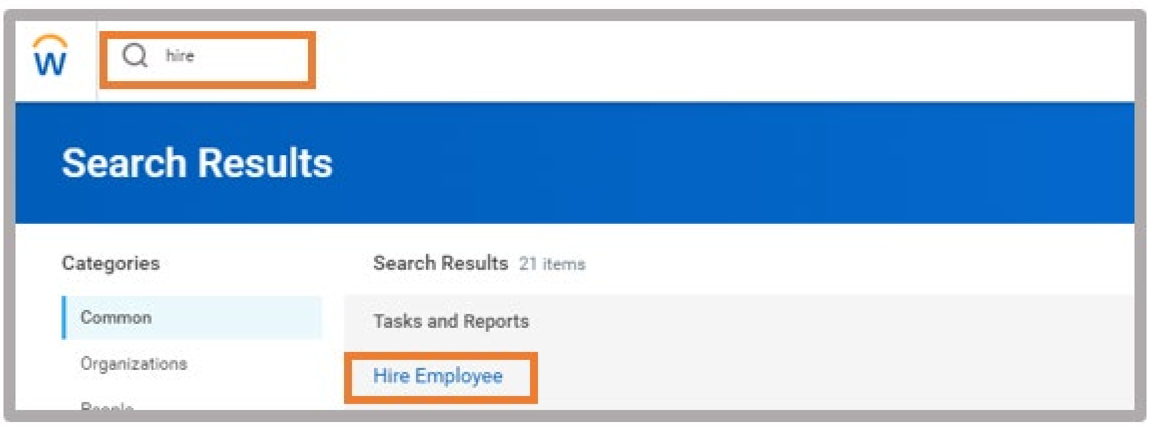

2. If their *Employee Name*:
    a. Appears as a hyperlink: They are an active employee – hover over the **Employee Name** to click the related actions (3 dots) and hover over Job Change to select **Add Job** and continue from **step 3** below.
    **Note:** If you are a manager and this is a former employee who most recently reported to you or is a retiree, their name will appear as a hyperlink, but there will be no *Add Job* option. In this case proceed with option "b" below.



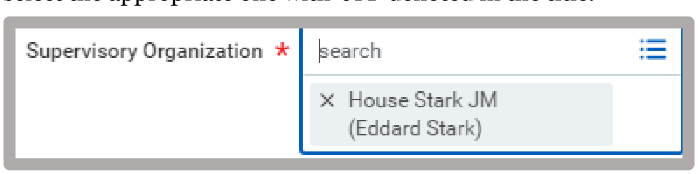

    b. Appears in the search results as text, not a hyperlink: They are a former employee in Workday - hover over the **Pre-Hire Name** to click the related actions (3 dots) and select **Hire** to rehire them and continue to **step 3** below.




c. Does not appear: They are brand new to Workday – Type **Hire Employee** in the main search bar to hire them into the system and follow the steps below.




3. Type the manager name of the supervisory organization (sup org) you are hiring into, in the Supervisory Organization search field and press enter to pull up a list of available sup orgs. From the available options, select the appropriate one with 'JM' denoted in the title.



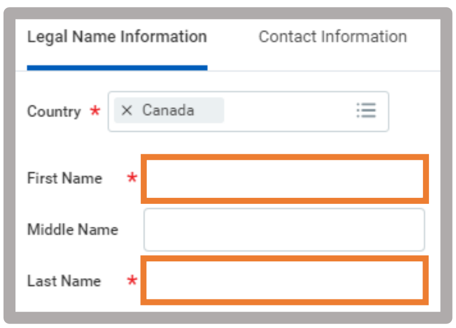

**Note:** *JM is short for Job Management. This is used to group positions without position numbers including casual and student hires.*

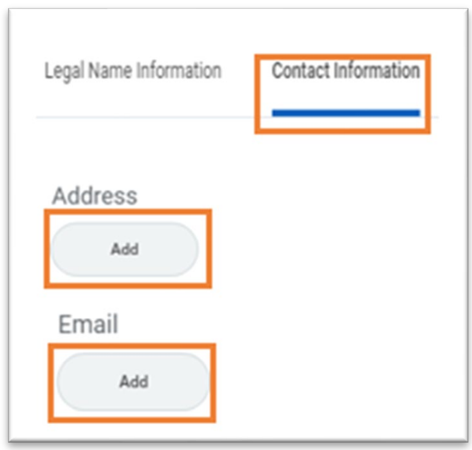
If you have not performed the *Employee Search*, please see step 2 before continuing.

4. a) **If the Employee Search produced no results:**
Select **Create a New Pre-Hire** if the employee was not found in the *Employee Search* and click **OK** to continue to the *employee's contact information*.
b) **If this is a rehire based off the Employee Search:**
Their name will now be populated in the **Existing Pre-Hire** field. Click **OK** to continue to step 7 – *Enter the employee's job details*.

## ENTER THE EMPLOYEE'S CONTACT INFORMATION

5. Enter the employee's **First** and **Last Name** and select the **Contact Information** tab to add a home address and an email address.

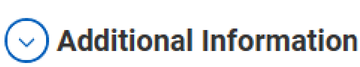



6. Click **OK** to continue to the job details.

## ENTER THE EMPLOYEE'S JOB DETAILS

7. Enter the **Hire Date** and choose the appropriate *Reason* (**New Hire** if brand new, **Rehire** if there was a previous Workday record).
**Tip**: If requesting 4 equal payments, enter the first day of the month of the applicable term.
8. Enter the appropriate *Employee Type* by selecting **For Current Country> Student (Fixed Term).**
9. In the *Job Profile* field, select or type **Co-op 7661**.
10. Select the appropriate **Time Type** (if 35 hours or greater, select Full Time, otherwise select Part Time).
11. Select the building **Location** for the employee from the list of **All Locations** or type the abbreviation.
12. Update **Default Hours** with the number of working hours per week to automatically adjust **Scheduled Weekly Hours** to the same amount.
**Tip**: Updating the Default Weekly Hours will avoid proration of the salary amount, by adjusting the FTE to 100%.
13. Expand **Additional Information** to enter the employment end date.




14. Enter an **End Employment Date** for the employee.

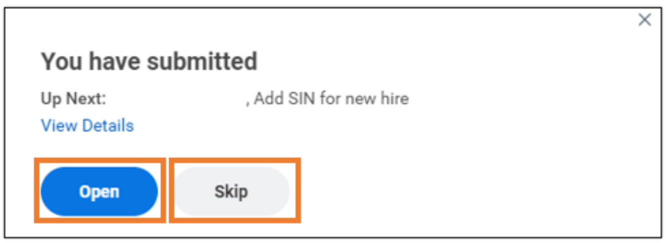
**Tip**: If requesting 4 equal payments, enter the last day of the month of end of the term.

15. If this student employee will be paid from a research account, please provide a short description of their job details in the comment box.
16. Click **Submit** to continue to enter SIN (step 17) if this is a new hire or to enter compensation details if this is a rehire (step 19).

If this is a brand new hire:

## ENTER SOCIAL INSURANCE NUMBER

17. Click **Open** to add a Social Insurance Number (SIN) OR click **Skip** and **OK** on the next screen to skip this step and continue to step 19.




**Tip:** If you clicked Open or out of the pop-up, the SIN task will be in your inbox to complete or skip from there. To skip it from your inbox, click the gear icon at the top right of the task and select **Skip This Task** and **OK**.

a) Click the + under the *National IDs* table to add the Canadian Social Insurance Number (SIN). Click in the empty fields to select the following:

Country – **Canada**

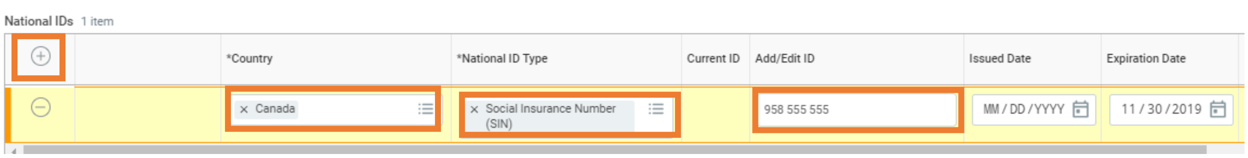
National ID Type - **Social Insurance Number**

Add/Edit ID - **9 digit Social Insurance Number**

Issued Date - **Leave blank**

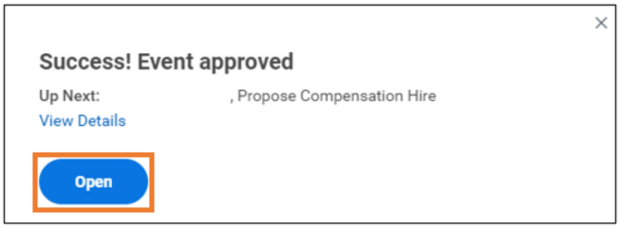
Expiration Date - Enter if Social Insurance Number starts with a "9", otherwise leave blank

18. Click **Approve.**




## ENTER EMPLOYEE COMPENSATION INFORMATION

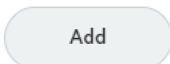
19. Click **Open** to go to the compensation screen**.**




**Tip:** If you clicked out of the pop-up, navigate to your Workday inbox and continue the task from there.

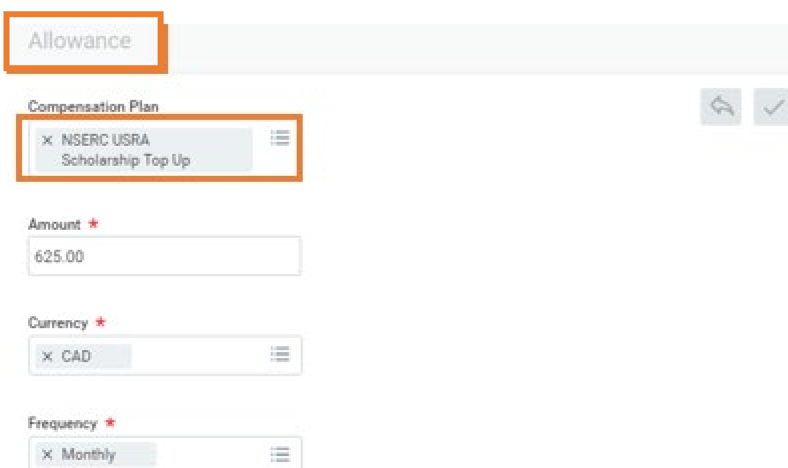
20. In the *Salary* section, click the X and Delete to close it. 

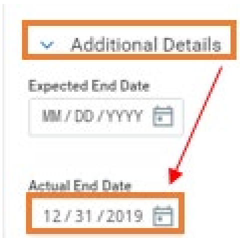
    **Tip**: The supplementary payment/top up will be added as an allowance plan as it is non-taxable.
21. Scroll down to click **Add** in the Allowance section.




22. Click in the *Compensation Plan* field and select **All Compensation Plans** to choose **NSERC USRA Scholarship Top Up**.
23. Enter the total applicable NSERC USRA top up amount (i.e. $625+$1200 = $1825 → enter this total amount)

    **Tip:** The NSERC USRA is paid through Quest as a scholarship, do not add the $1,125/month.
24. Click **Additional Details** underneath *Frequency* to expand the fields.
25. Enter the **Actual End Date** to be the same as the End Employment Date (i.e. the end date that was entered on the job details screen).

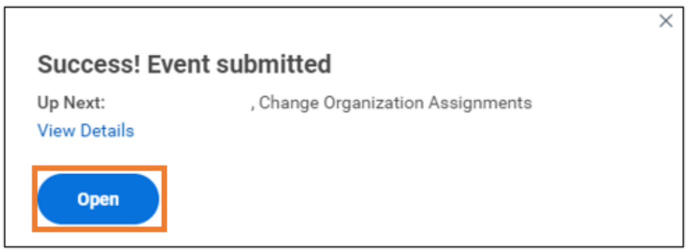





26. Click the **Submit** to continue on to the account entry screen (Change Organization Assignment).

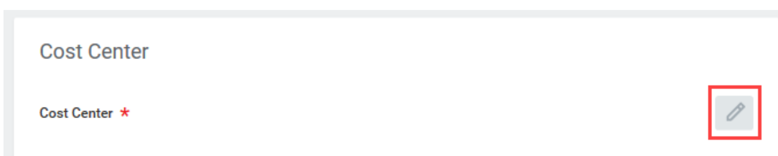
## ENTER CHANGE ORGANIZATION ASSIGNMENT

27. Click **Open.**

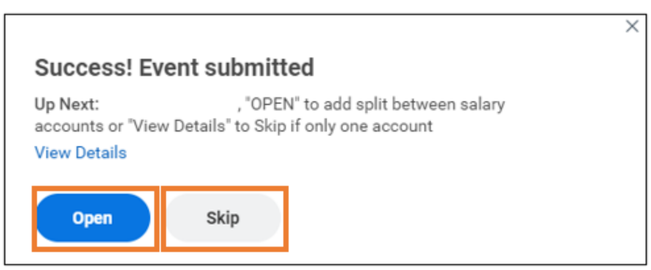



**Tip:** If you clicked out of the pop-up, navigate to your Workday inbox and continue the task from there.

28. In the *Cost Center* section, click the **Edit** icon and enter the work order and activity for the NSERC USRA top up payment.



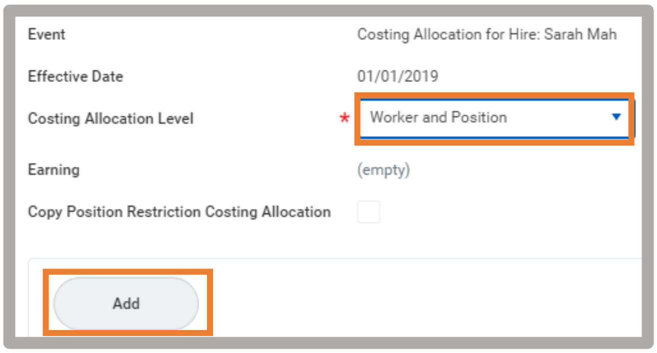

29. Click **Submit.**
30. If there is only one applicable Cost Center, click **Skip** for *Add Split Between Salary Accounts*, then **OK** to send the hire to HR for review OR, if there is more than one funding source for the top up, continue to the next steps below.




**Tip:** If you clicked Open or clicked out of the pop-up instead of Skipping, navigate to your Workday inbox and select the gear icon (task actions) in the top right of the Assign Costing Allocation inbox item and click **Skip This Task** and then **OK** on the next screen to skip.

**If there is more than one Cost Center:**

31. Click **Open** to enter additional NSERC USRA top up accounts.
32. For *Costing Allocation Level,* select **Worker and Position.**




33. Click **Add.**
34. In the resulting table, enter the **department** (salary top up) work order and activity in the **Worktags** field. If only entering one salary account, click **Submit** and **Done** to send the hire to HR for review. If more than one salary account needs to be added, continue to the next step.
35. If more than one account for the department salary amount, click the + in the table to add a row and enter the additional account in the **Worktags** field.
36. Enter the appropriate **Distribution Percent.**

**Tip:** To view the status of your hire, type the employee's name into the main Workday search bar and press enter. Make sure **All of Workday** is selected under *Categories* and click the *Hire:(employee name)* link. Click the **Process** tab on the resulting screen and scroll down the table to see what part of the process the hire is in; OR find the submitted Hire event in the Archive section of your Workday inbox and click the Process tab (items are archived for 30 days).

## HIRE A WORK STUDY EMPLOYEE

**Hire initiation**
- Manager
- Delegate
- Campus Partner

**Hire review - job details (dates, employee type, hours)**
Manager (if initiator is not the Manager or a delegated approver)

**Hire review - job details (dates, employee type, hours)**
Human Resources Administration (HR Ops Partner)

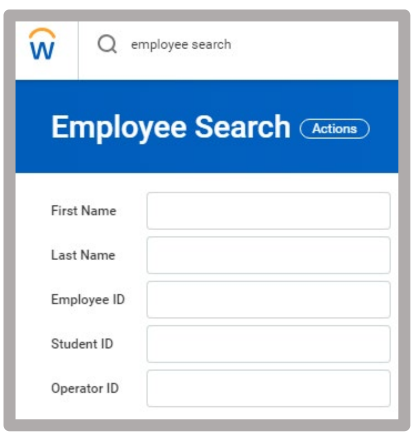
**Consolidated approval - compensation and funding sources**
- Office of Research (if paid from a research account)
- Signing authority

**Hire finalization**
Human Resources Administration (HR Ops Partner)

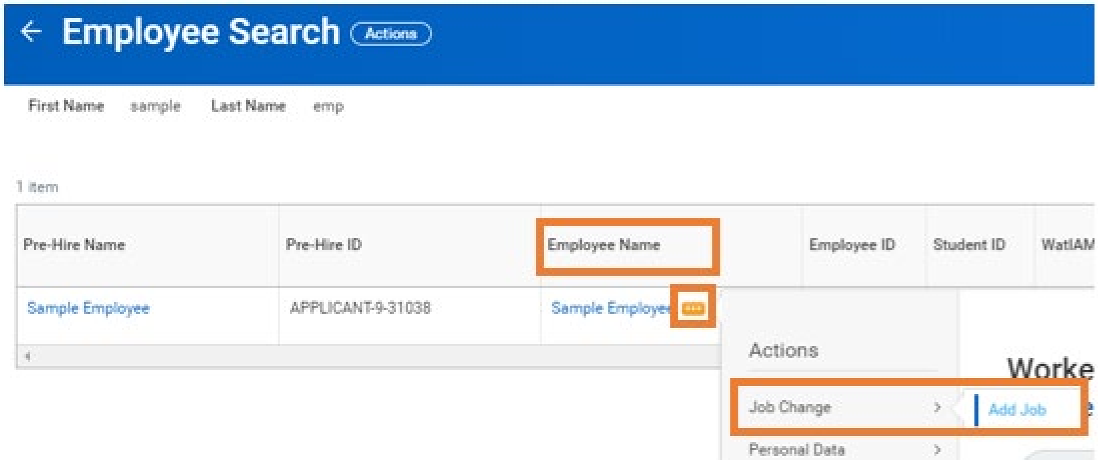
**Onboarding - update banking, SIN, contact information, etc.**
Employee

The steps outlined below will guide you through the process of hiring a Work Study employee in Workday.

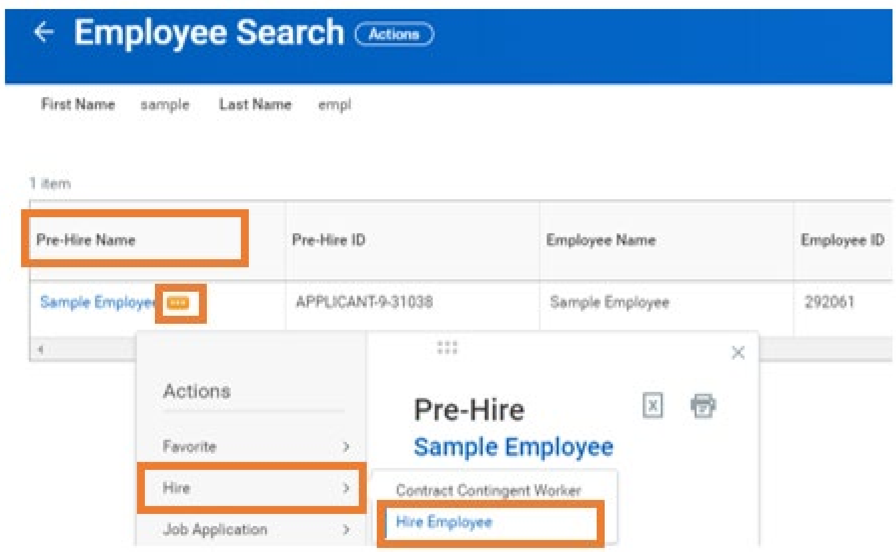
1. Type **Employee Search** into the main search bar to access the search by employee ID, student ID search function to determine if the new employee exists in Workday.



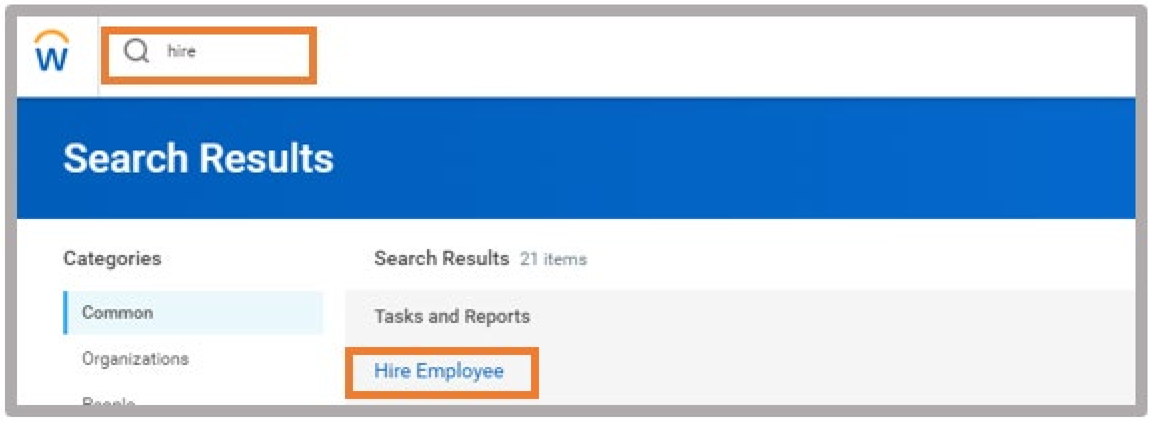

2. If their *Employee Name*:
   a. Appears as a hyperlink: They are an active employee – hover over the **Employee Name** to click the related actions (3 dots) and hover over Job Change to select **Add Job** and continue from **step 3** below.
   **Note:** If you are a manager and this is a former employee who most recently reported to you or is a retiree, their name will appear as a hyperlink, but there will be no *Add Job* option. In this case proceed with option "b" below.



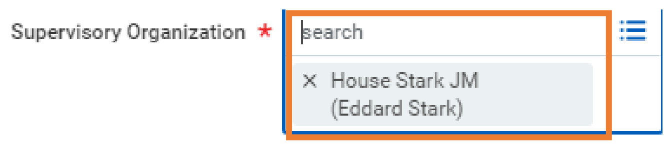

b. Appears in the search results as text, not a hyperlink: They are a former employee in Workday - hover over the **Pre-Hire Name** to click the related actions (3 dots) and select **Hire** to rehire them and continue to **step 3** below.




c. Does not appear: They are brand new to Workday – Type **Hire Employee** in the main search bar to hire them into the system and follow the steps below.




3. Type the manager name of the supervisory organization (sup org) you are hiring into, in the Supervisory Organization search field and press enter to pull up a list of available sup orgs. From the available options, select the appropriate one with 'JM' denoted in the title.



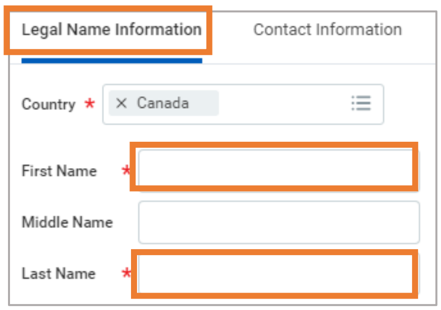

**Note:** *JM is short for Job Management. This is used to group positions without position numbers including casual and student hires.*

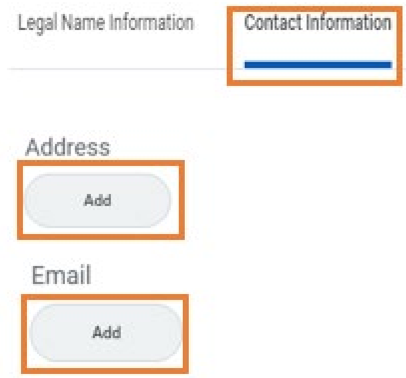
If you have not performed the *Employee Search*, please see step 2 before continuing.

4. **If the Employee Search produced no results:**
Select **Create a New Pre-Hire** if the employee was not found in the *Employee Search* and click **OK** to continue to the *employee's contact information*.
**If this is a rehire based off the Employee Search:**
Their name will now be populated in the **Existing Pre-Hire** field. Click **OK** to continue to step 7 – *Enter the employee's job details*.

### ENTER THE EMPLOYEE'S CONTACT INFORMATION

5. Enter the employee's **First** and **Last Name** and select the **Contact Information** tab to add a home address and an email address.

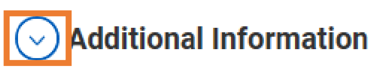



6. Click **OK** to continue to the job details.

### ENTER THE EMPLOYEE'S JOB DETAILS

7. Enter the **Hire Date** and choose the appropriate *Reason* (**New Hire** if brand new, **Rehire** if there was a previous Workday record).
8. Select or type **Casual (Fixed Term)** in the *Employee Type* list.
9. In the *Job Profile* field, select or type **Casual – Int'nl Work Study** OR **Casual – Ontario Work Study**.
10. For *Time Type*, select **Part Time**.
11. Select the building **Location** for the employee from the list.
12. Leave *Default Weekly Hours* as is and update **Scheduled Weekly Hours** with the expected number of hours per week.
13. Expand **Additional Information**.

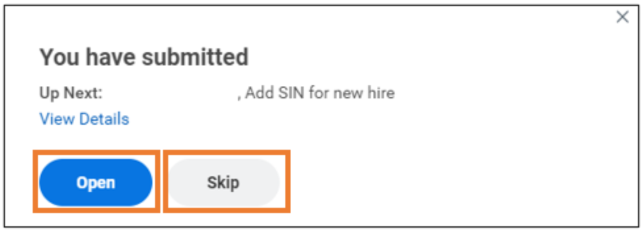



14. Update the **Job Title** to the employee's actual title.
    **Note:** *This ensures the correct casual position is selected when entering time for multiple casual positions.*
15. Enter an **End Employment Date** for the employee.
16. Click **Submit** to continue to enter SIN if this is a new hire (step 17) or to enter compensation details if this is a rehire (step 19).

    If this is a brand new hire:

### ENTER SOCIAL INSURANCE NUMBER

17. Click **Open** to add a Social Insurance Number (SIN) OR click **View Details** and then **Skip** to skip this step and continue to step 19.




**Tip:** If you clicked Open or out of the pop-up, the SIN task will be in your inbox to complete or skip from there. To skip it from your inbox, click the gear icon at the top right of the task and select **Skip This Task** and **OK**.

a) Click the + under the *National IDs* table to add the Canadian Social Insurance Number (SIN). Click in the empty fields to select the following:

Country – **Canada**

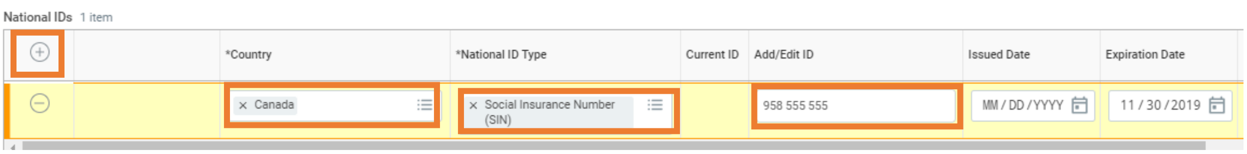
National ID Type - **Social Insurance Number**

Add/Edit ID - **9 digit Social Insurance Number**

Issued Date - **Leave blank**

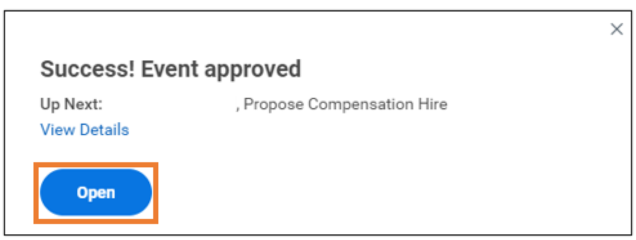
Expiration Date - Enter if Social Insurance Number starts with a "9", otherwise leave blank

18. Click **Approve.**



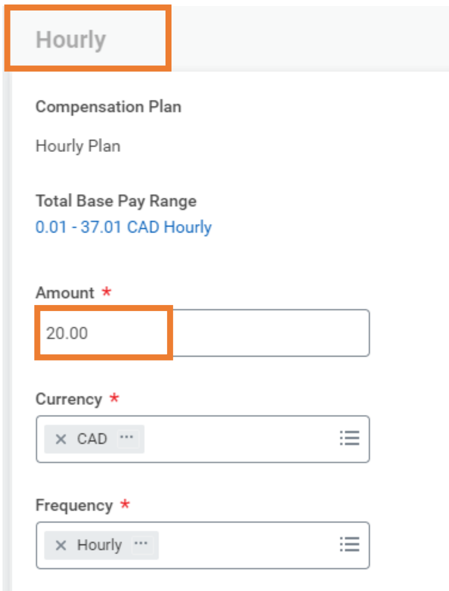

## ENTER EMPLOYEE COMPENSATION INFORMATION

19. Click **Open** to go to the compensation screen**.**




**Tip:** If you clicked out of the pop-up, navigate to your Workday inbox and continue the task from there.

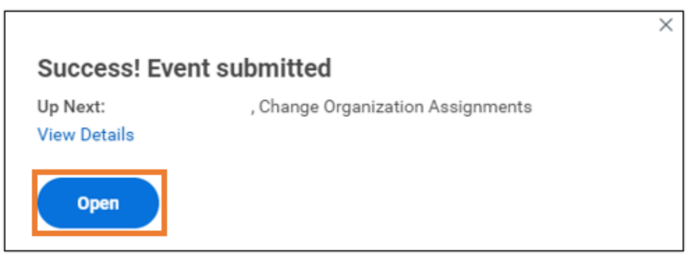
20. Click the **edit icon** in the *Hourly* section.
21. In the *Amount* field, enter an hourly rate.




22. Click **Submit** to continue on to the salary account details**.**

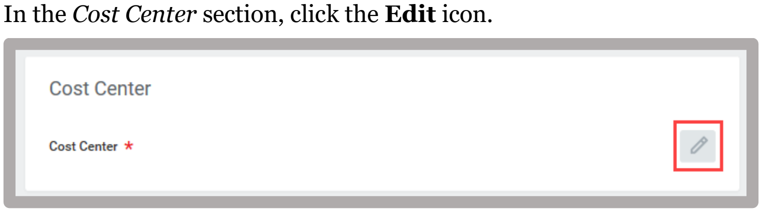
## ENTER CHANGE ORGANIZATION ASSIGNMENT

23. Click **Open** to continue to update the cost center**.**

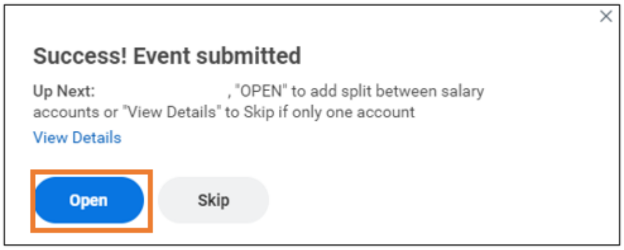



**Tip:** If you clicked out of the pop-up, navigate to your Workday inbox and continue the task from there.

24. In the *Cost Center* section, click the **Edit** icon.

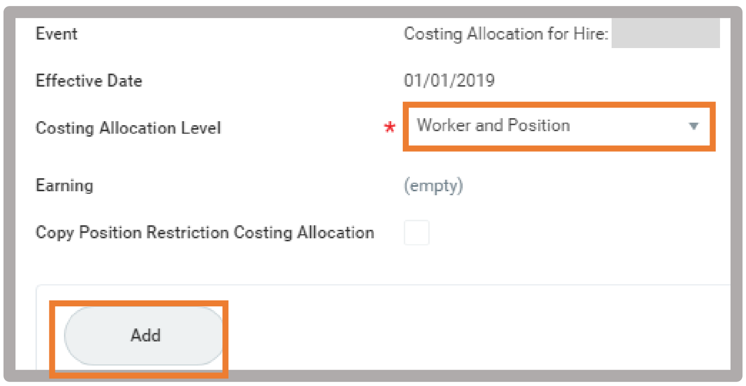



25. Enter the **Work Study** work order and activity for the employee (Ontario WS: 10000-10739 100 or International WS: 10000-10706 100).
26. Click **Submit.**
27. Click **Open** for *Add Split Between Salary Accounts*.

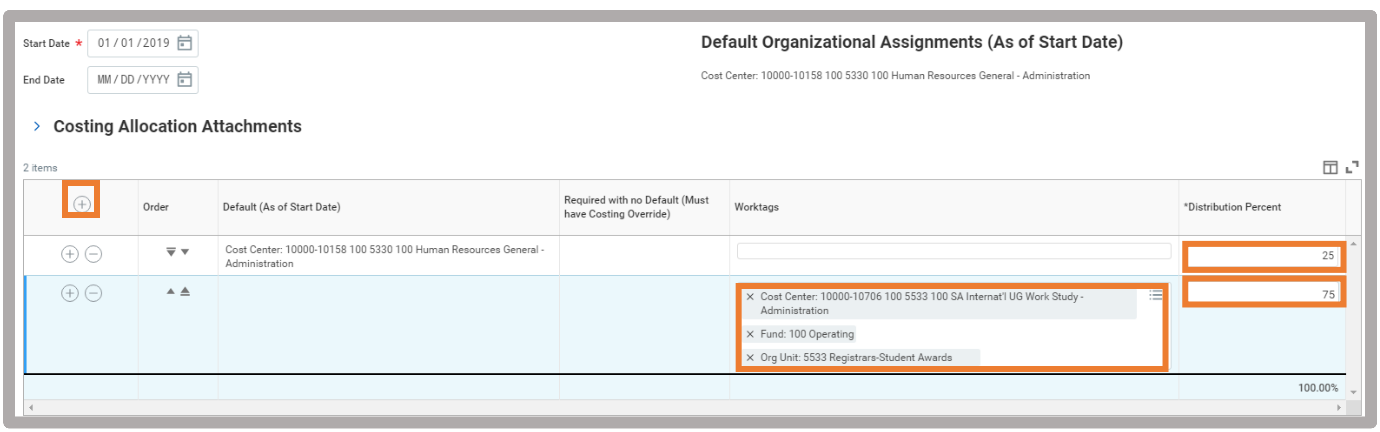



**Tip:** If you clicked out of the pop-up, navigate to your Workday inbox and continue the task from there.

28. In the *Costing Allocation Level* field, select **Worker and Position.**
29. Click **Add** to open the account fields.




30. Click the **+** in the table to add a new row and enter the **department** work order and activity in the **Worktags** field and press Enter on the keyboard.
31. In the **Distribution Percent* field, enter **25** for the department owned account and **75** for the Work Study account.




32. Click **Submit** to send to HR for review.

    **Tip**: To view the status of your hire, type the employee's name into the main Workday search bar and press enter. Make sure **All of Workday** is selected under *Categories* and click the *Hire:(employee name)* link.

Click the **Process** tab on the resulting screen and scroll down the table to see what part of the process the hire is in; OR find the submitted Hire event in the Archive section of your Workday inbox and click the Process tab (items are archived for 30 days).

## HIRE FOR A ONE-TIME PAYMENT

**Hire initiation**
- Manager
- Delegate
- Campus Partner

**Hire review - job details (dates, employee type, hours)**
Manager (if initiator is not the Manager or a delegated approver)

**Hire review - job details (dates, employee type, hours)**
Human Resources Administration (HR Ops Partner)

**Consolidated approval - compensation and funding sources**
- Office of Research (if paid from a research account)
- Signing authority

**Hire finalization**
Human Resources Administration (HR Ops Partner)

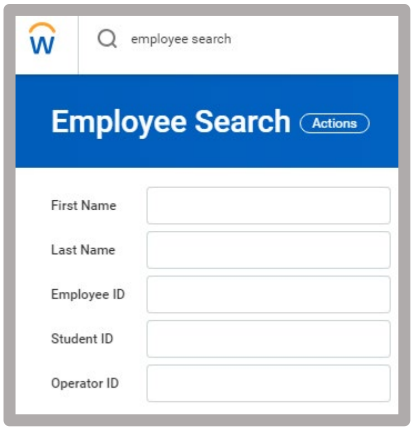
The steps outlined below will guide you through the process of entering a one-time payment in Workday and should be used for non-UW employees who are receiving the following types of payments in Canadian currency:

- Award
- External guest speaker/lecturer
- External reviewer/examiner/assessor
- External Prize
- Honourarium of $500 or less
- Research participant payment of more than $300

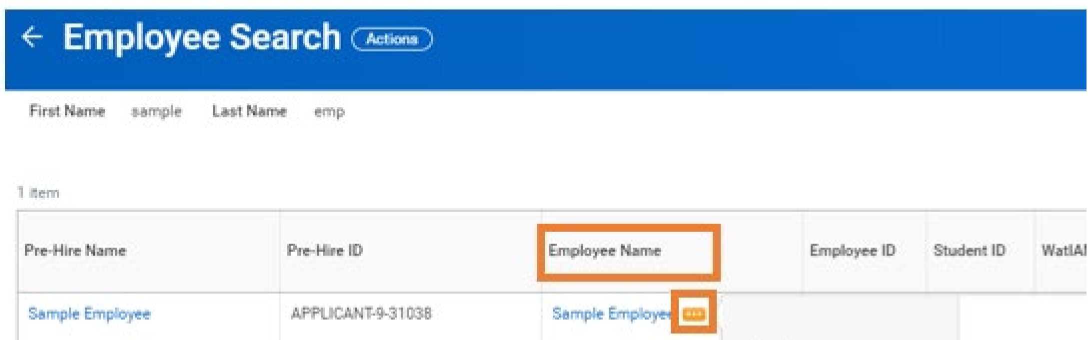
Individuals who qualify for the above payments will need to be hired into Workday as casual employees as per the process outlined below, however they will not receive the onboarding steps within Workday.
If the payee is external but does not fall into one of the categories listed above, or if they are already active in Workday, reference the Payment Types chart to determine how to proceed. Questions regarding payment types can be directed to payroll@uwaterloo.ca. Payments to existing/active staff and faculty should be completed on the paper One-Time Payment Request Form.

Any payments that are to be made in a foreign currency must be submitted on the Foreign Fund Payment Request Form along with a Wire transfer form (if applicable) and sent to Payroll in EC 1.

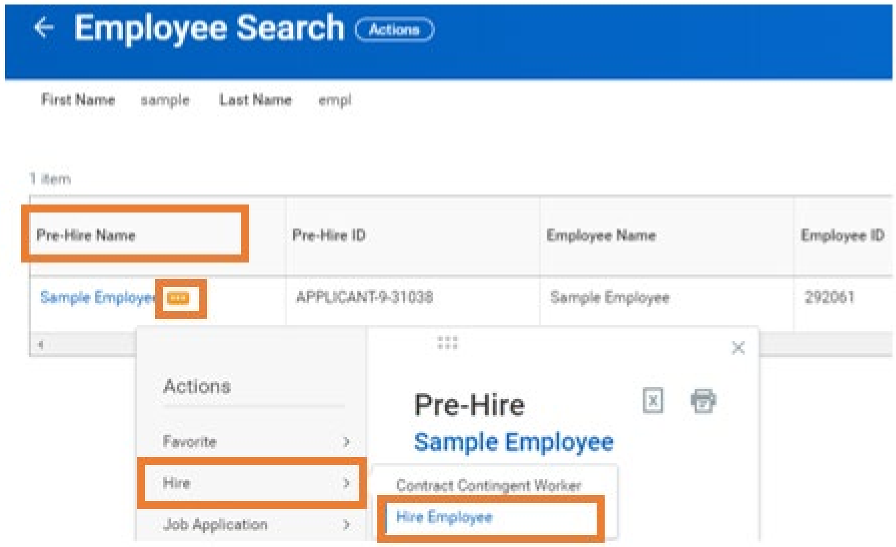
1. Type **Employee Search** into the main search bar to search by employee ID and/or student ID if known, or first and last name to determine if the payee exists in Workday.



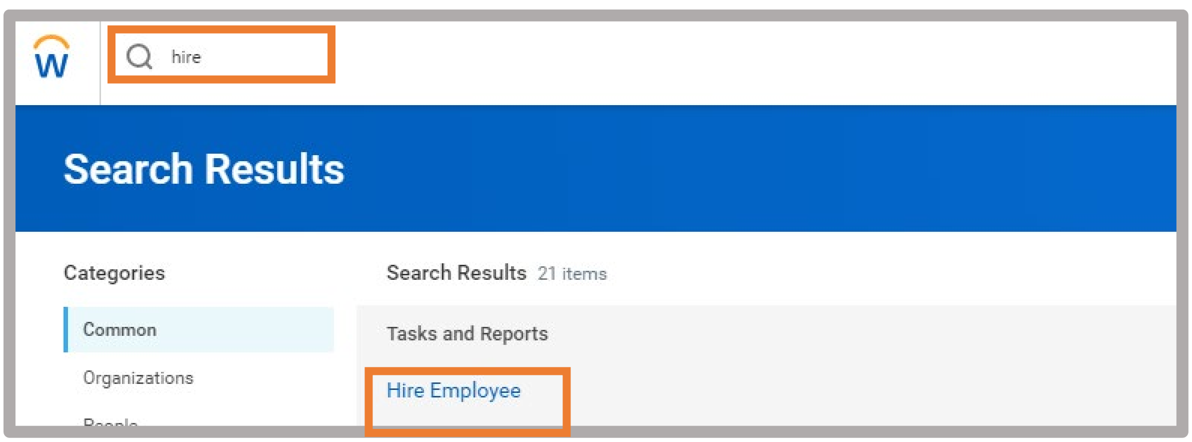

2. If their *Employee Name*:
    a. Appears as a hyperlink: They are an active employee – submit a paper One-Time Request Form to Payroll in EC 1.
    **Note:** If you are a manager and this is a former employee who most recently reported to you or is a retiree, their name will appear as a hyperlink, but there will be no *Add Job* option. In this case proceed with option "b" below.



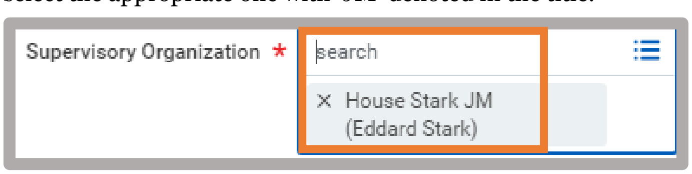

    b. Appears in the search results as text, not a hyperlink: They are a former employee in Workday - hover over the **Pre-Hire Name** to click the related actions (3 dots) and select **Hire** to rehire them and continue to **step 3** below.




c. Does not appear: They are brand new to Workday – Type **Hire Employee** in the main search bar to hire them into the system and follow the steps below.



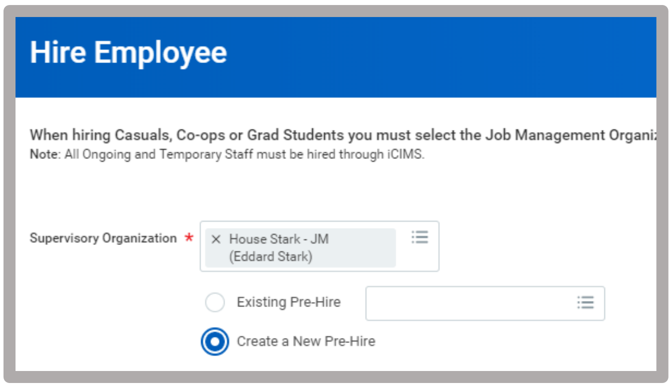

3. Type the manager name of the supervisory organization (sup org) you are hiring into, in the Supervisory Organization search field and press enter to pull up a list of available sup orgs. From the available options, select the appropriate one with 'JM' denoted in the title.




**Note:** *JM is short for Job Management. This is used to group positions without position numbers including casual and student employees.*

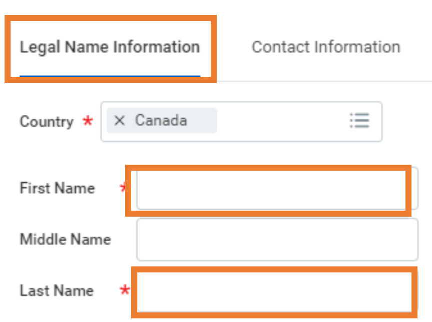
If you have not performed the *Employee Search*, please see step 2 before continuing.

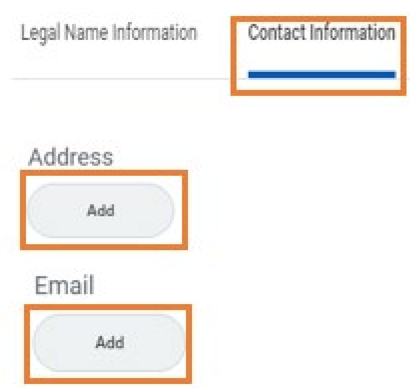
4. **If the Employee Search produced no results:**
   Select **Create a New Pre-Hire** and click **OK** to continue to the individual's contact information.
   **If this is a rehire based off the Employee Search:**
   Their name will now be populated in the **Existing Pre-Hire** field. Click **OK** to continue to step 7 – *Enter the employee's job details*.




## ENTER THE EMPLOYEE'S CONTACT INFORMATION

5. Enter the employee's **First** and **Last Name** and then select the **Contact Information** tab to add contact information.
   **Note:** If this employee will not be logging into Workday to provide direct deposit information, leave the email address blank. If blank, they will not receive a watIAM email to create a user name for Workday. Address is required for these types of payments.

6. 

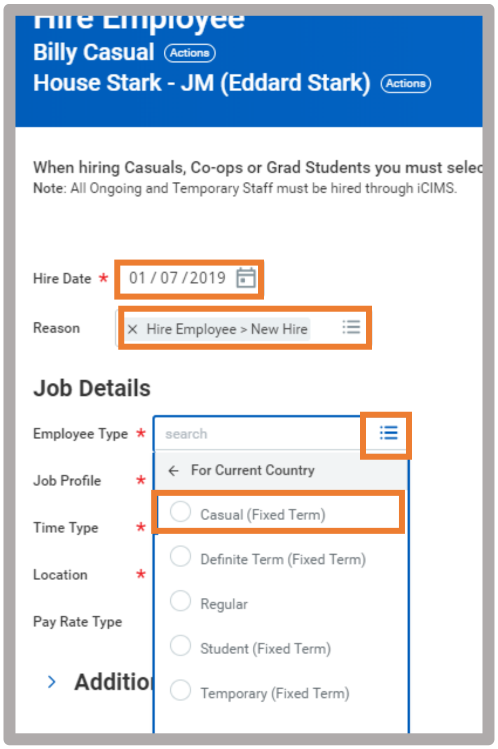




**Hint:** Leave Source and Referred by sections blank.

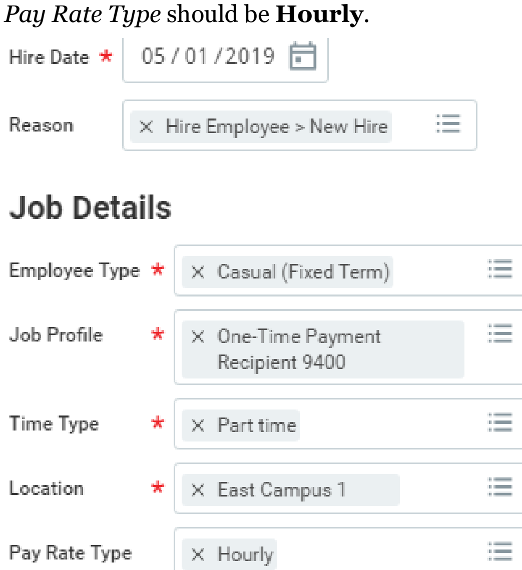
## ENTER THE EMPLOYEE'S JOB DETAILS

7. Enter the **Hire Date** and choose the appropriate *Reason* (**New Hire** if brand new, **Rehire** if there was a previous Workday record).

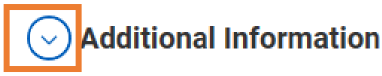
8. In *Employee Type*, select **For Current Country** then select **Casual (Fixed Term)**, or type “Casual (Fixed Term)” in the empty search field.




9. For *Job Profile*, select or type **One-Time Payment Recipient 9400**.
10. For *Time Type*, select **Part Time**.
11. Select the building **Location** for the employee from the list or type in the abbreviation.
12. *Pay Rate Type* should be **Hourly**.



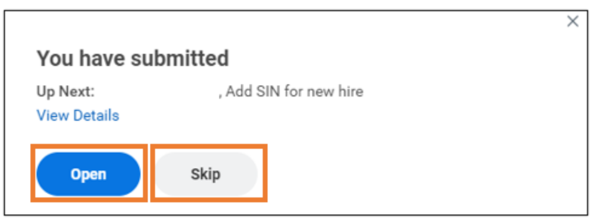
13. Leave *Default Weekly Hours* and *Scheduled Weekly Hours* as they are.
14. Expand **Additional Information**.




15. Leave the **Job Title** as is.
16. Enter an **End Employment Date** within the current pay period.
    **Tip**: the end date should be within the current pay period to allow time for the payment to be processed prior to the termination date.
17. If this one-time payment will be paid from a research account, please provide a short description of the appointment details in the comment box for the Office of Research to review.
18. Click **Submit** to continue to enter SIN if this is a new hire (step 19) or to enter compensation details if this is a rehire (step 21).
    **Tip:** An alert will come up because this person is listed as Part-Time with 35 hours. Click **Submit** again without making any changes to continue.

### ENTER SOCIAL INSURANCE NUMBER

19. Click **Open** to add a Social Insurance Number (SIN) OR click **Skip** and **OK** on the next screen to skip this step if this is not a Canadian Resident and continue to step 21.

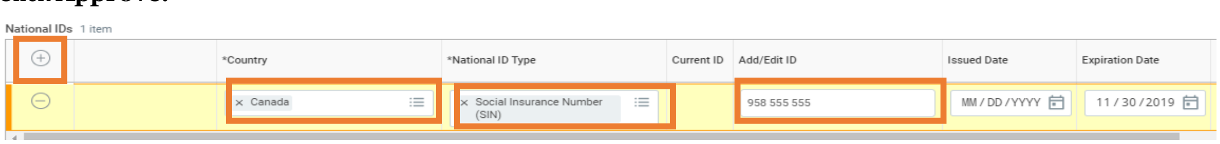



**Tip:** If you clicked Open or out of the pop-up, the SIN task will be in your inbox to complete or skip from there. To skip it from your inbox, click the gear icon at the top right of the task and select **Skip This Task** and **OK**.

If entering a SIN:

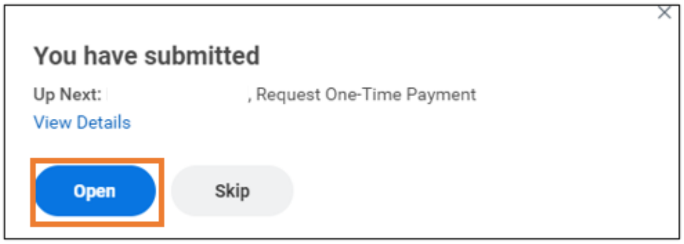
a) Click the + under the *National IDs* table to add the Canadian Social Insurance Number (SIN). Click in the empty fields to select the following:
   Country - **Canada**
   
   National ID Type - **Social Insurance Number**
   
   Add/Edit ID - **9 digit Social Insurance Number**
   
   Issued Date - **Leave blank**
   
   Expiration Date - Enter if Social Insurance Number starts with a "9", otherwise leave blank

20. Click **Approve.**



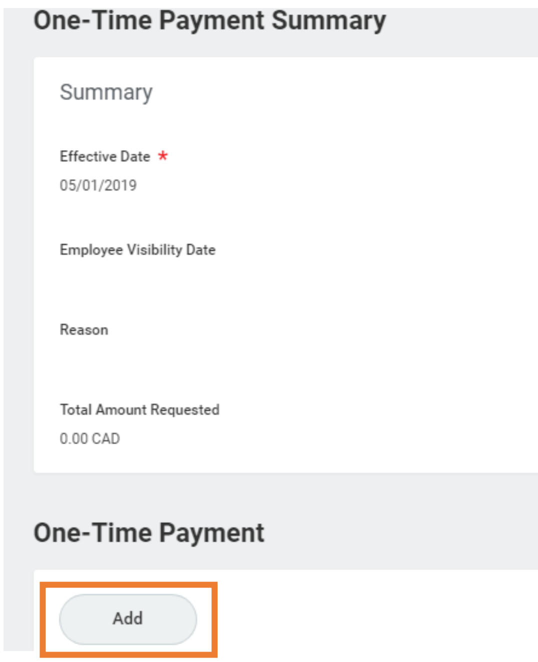
### ENTER ONE-TIME PAYMENT INFORMATION

21. Click **Open** to enter the payment details.

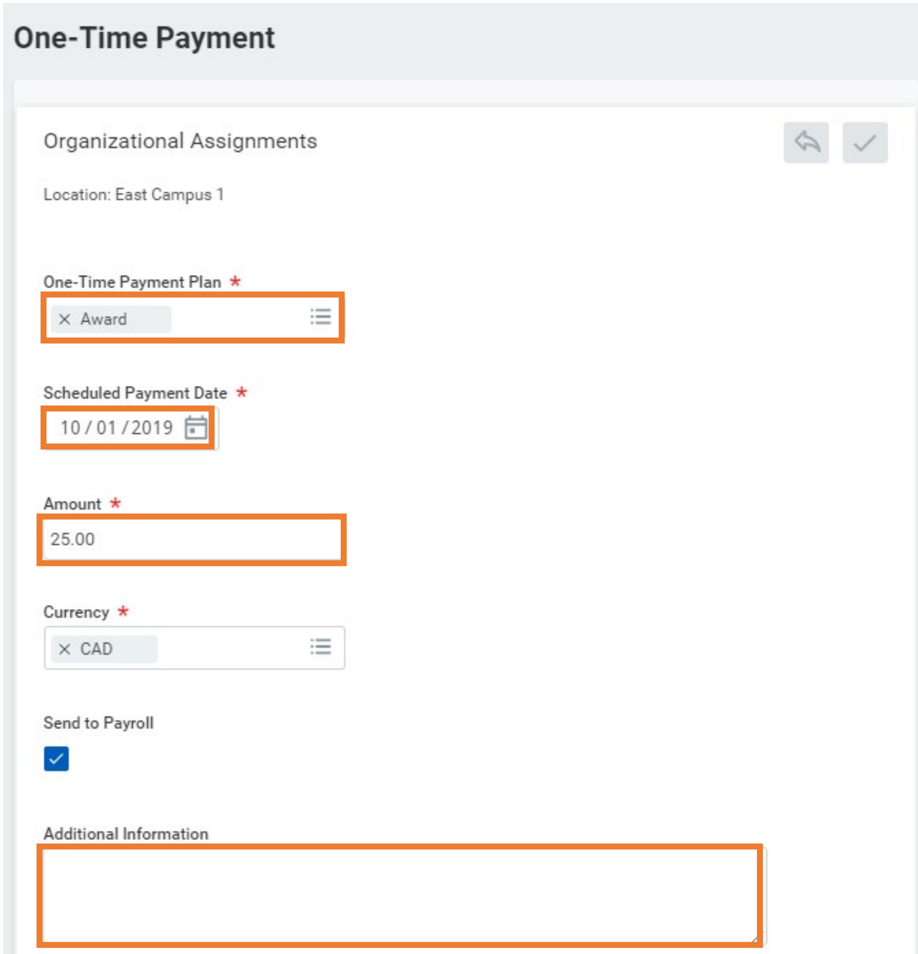



**Tip:** If you clicked out of the pop-up, navigate to your Workday inbox and continue the task from there.

22. In the **Effective Date** field, enter today's date or a future date if this payment is to be future-dated.
23. Leave other fields in this section blank.
24. Click the **Add** button in the *One-Time Payment* section below.



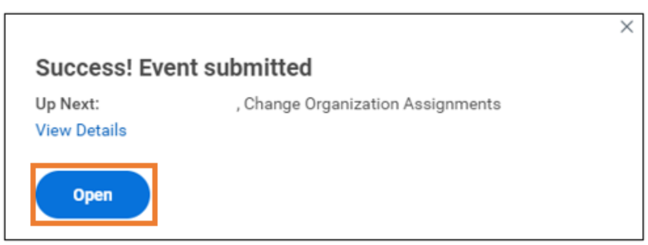

25. In the *One-Time Payment Plan*, select **All Plans** and then the appropriate payment type.
26. For *Scheduled Payment Date,* enter today's date.
27. Enter the payment amount.
28. Leave *Send to Payroll* checked on.
29. Enter a description in the *Additional Information* section, providing details of what the payment is for.




30. Click **Submit**.

## ENTER CHANGE ORGANIZATION ASSIGNMENT

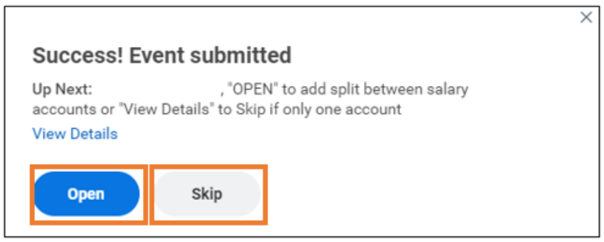
31. Click **Open** to continue to update the cost center**.**




**Tip:** If you clicked out of the pop-up, navigate to your Workday inbox and continue the task from there.

32. Click the **Edit** icon in the *Cost Center* section.

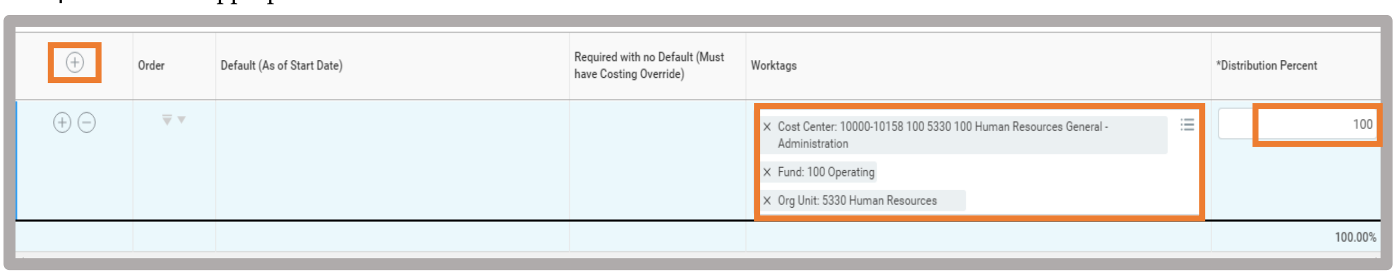

33. Enter the **Cost Center** for the employee.
34. Click **Submit.**
35. If there is only one applicable Cost Center, click **Skip** for *Add Split Between Salary Accounts*, then **OK** to send the hire to HR for review. If there is more than one cost center, click **Open** and see the steps below.




**Tip**: Leave the reason field blank for skipped fields. If you clicked Open or clicked out of the pop-up instead of Skipping, navigate to your Workday inbox and select the gear icon (task actions) in the top right of the Assign Costing Allocation inbox item and click **Skip This Task** and then **OK** on the next screen to skip.

**If there is more than one Cost Center:**

36. Click **Open** to enter additional salary accounts.
37. Select **Worker and Position** for the *Costing Allocation Level.*
38. Click **Add.**
39. Select the + button to add an additional row and enter the additional cost center into the *Worktags* field.
40. Enter the appropriate **Distribution Percent.**




41. Click **Submit** and **Done.** The initiation of this hire is now complete and will go to HR for review.

**Tip:** To view the status of your hire, type the employee's name into the main Workday search bar and press enter. Make sure **All of Workday** is selected under *Categories* and click the *Hire:(employee name)* link. Click the **Process** tab on the resulting screen and scroll down the table to see what part of the process the hire is in; OR find the submitted Hire event in the Archive section of your Workday inbox and click the Process tab (items are archived for 30 days).

## HIRE A SPONSORED STUDENT

**Hire initiation**
- Manager
- Delegate
- Campus Partner

**Hire review - job details (dates, employee type, hours)**
Manager (if initiator is not the Manager or a delegated approver)

**Hire review - job details (dates, employee type, hours)**
Human Resources Administration (HR Ops Partner)

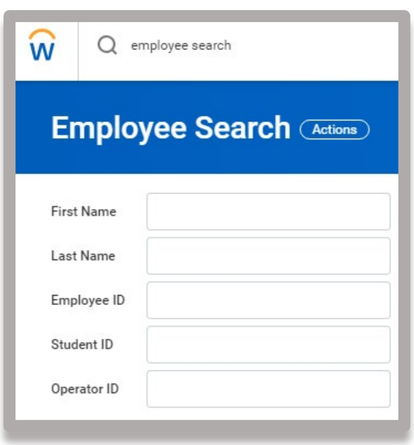
**Consolidated approval - compensation and funding sources**
- Office of Research (if paid from a research account)
- Signing authority

**Hire finalization**
Human Resources Administration (HR Ops Partner)

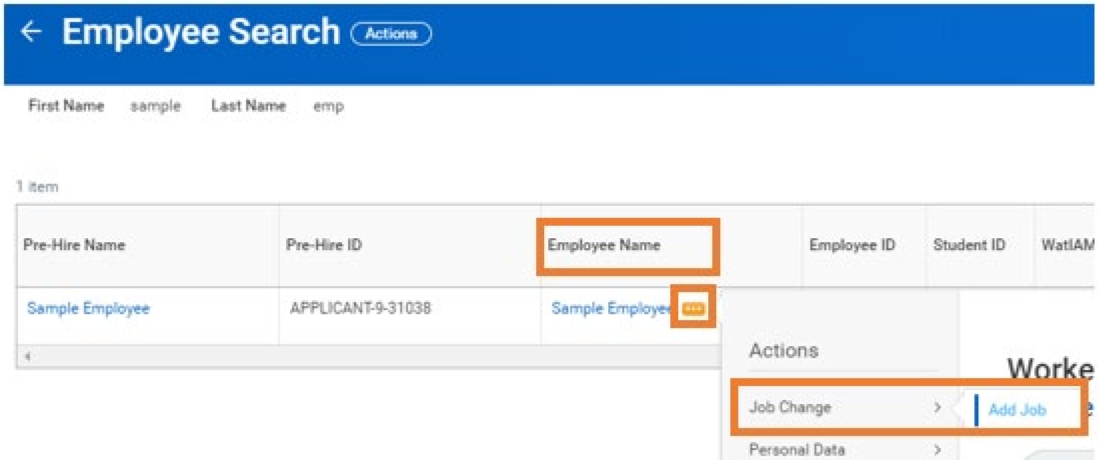
**Onboarding - update banking, SIN, contact information, etc.**
Employee

The steps outlined below will guide you through the process of hiring an Undergraduate Research Internship (URI), student.

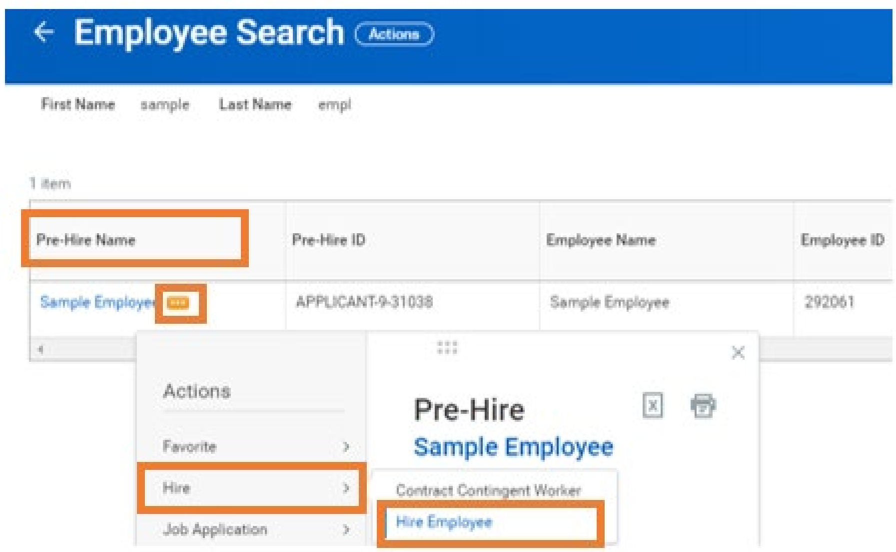
1. Type **Employee Search** into the main search bar to access the search by employee ID, student ID search function to determine if the new employee exists in Workday.



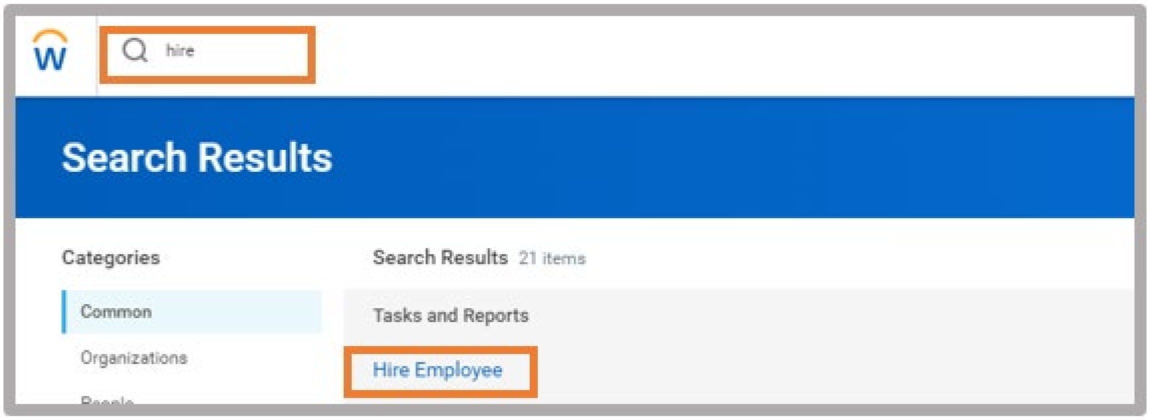

2. If their *Employee Name*:
    1. Appears as a hyperlink: They are an active employee – hover over the **Employee Name** to click the related actions (3 dots) and hover over Job Change to select **Add Job** and continue from **step 3** below.
    **Note:** if you are a manager and this is a former employee who most recently reported to you, their name will appear as a hyperlink, but there will be no *Add Job* option. In this case proceed with option "b" below.



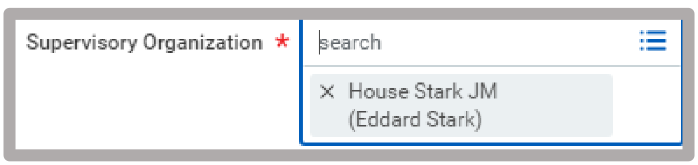

2. Appears in the search results as text, not a hyperlink: They are a former employee in Workday - hover over the **Pre-Hire Name** to click the related actions (3 dots) and select **Hire** to rehire them and continue to **step 3** below.




3. Does not appear: They are brand new to Workday – Type **Hire Employee** in the main search bar to hire them into the system and follow the steps below.




3. Type the manager name of the supervisory organization (sup org) you are hiring into, in the Supervisory Organization search field and press enter to pull up a list of available sup orgs. From the available options, select the appropriate one with 'JM' denoted in the title.




**Note:** *JM is short for Job Management. This is used to group positions without position numbers including casual and student hires.*

If you have not performed the *Employee Search*, please see step 2 before continuing.

4. **If the Employee Search produced no results:**

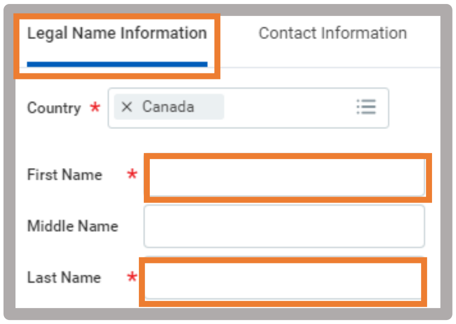
   Select **Create a New Pre-Hire** if the employee was not found in the *Employee Search* and click **OK** to continue to the *employee's contact information*.

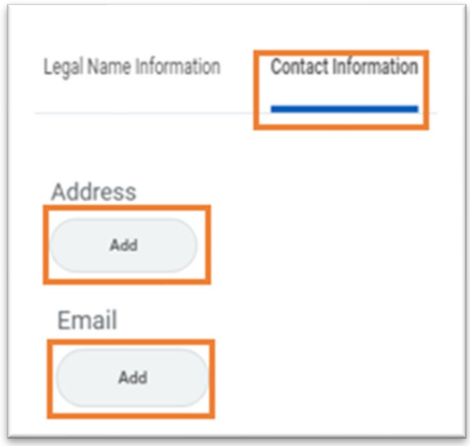
   **If this is a rehire based off the Employee Search:**

   Their name will now be populated in the **Existing Pre-Hire** field. Click **OK** to continue to step 7 – *Enter the employee's job details*.

### ENTER THE EMPLOYEE'S CONTACT INFORMATION

5. Enter the employee's **First** and **Last Name** and select the **Contact Information** tab to add a home address and an email address.

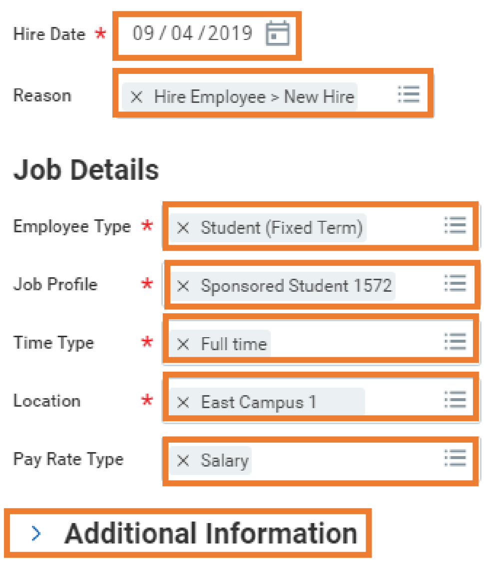


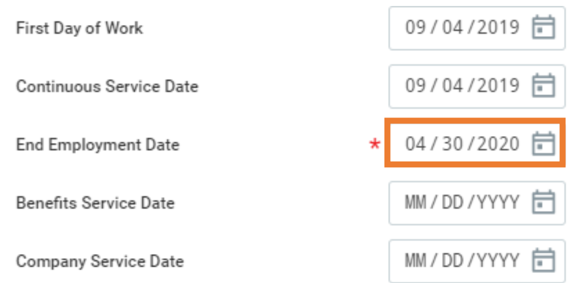

6. Click **OK** to continue to the job details.

## ENTER THE EMPLOYEE'S JOB DETAILS

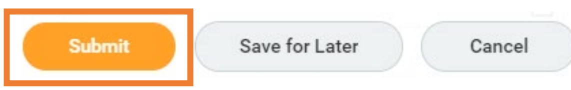
7. Enter the **Hire Date** and choose the appropriate *Reason* (**New Hire** if brand new, **Rehire** if there was a previous Workday record).
   **Tip**: If requesting 4 equal payments, enter the first day of the month of the applicable term(s).
8. Enter the appropriate *Employee Type* by selecting **For Current Country> Student (Fixed Term).**
9. In the *Job Profile* field, select or type **Sponsored Student 1572**.
10. For *Time Type*, select **Full Time.**
11. Select the building **Location** for the employee from the list of **All Locations** or type the abbreviation.
12. Leave **Default Hours** and **Scheduled Weekly Hours** as 35.
13. Expand **Additional Information** to enter the employment end date.




14. Enter an **End Employment Date** for the employee.
    **Tip**: If requesting equal payments, enter the last day of the month.

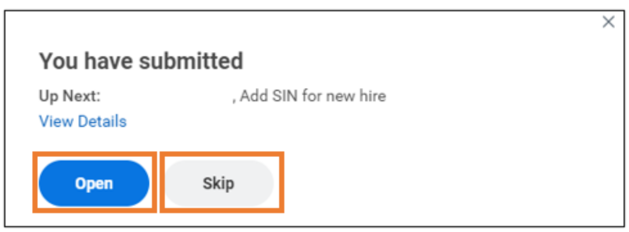



15. Click **Submit** to continue to enter SIN details.




## ENTER SOCIAL INSURANCE NUMBER

16. Click **Open** to add a Social Insurance Number (SIN) OR click **Skip** and **OK** on the next screen to skip this step if not a Canadian Resident and continue to step 18.




**Tip:** If you clicked Open or out of the pop-up, the SIN task will be in your inbox to complete or skip from there. To skip it from your inbox, click the gear icon at the top right of the task and select **Skip This Task** and **OK**.

If entering a SIN:

a) Click the + under the *National IDs* table to add the Canadian Social Insurance Number (SIN). Click in the empty fields to select the following:

Country - **Canada**

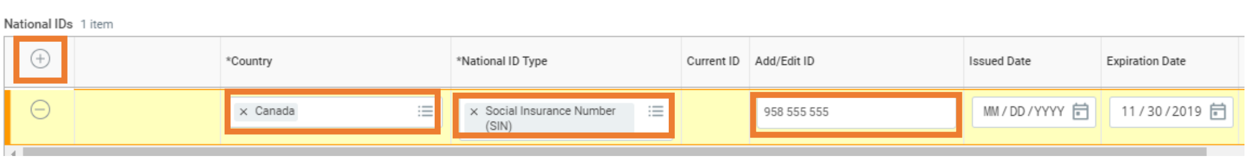
National ID Type - **Social Insurance Number**

Add/Edit ID - **9 digit Social Insurance Number**

Issued Date - **Leave blank**

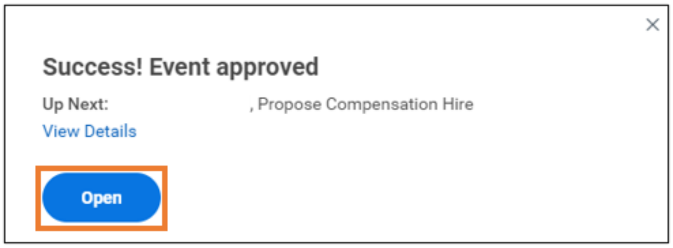
Expiration Date - Enter if Social Insurance Number starts with a "9", otherwise leave blank

17. Click **Approve.**



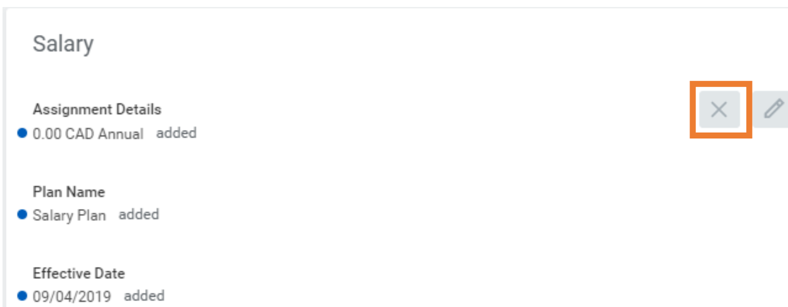
### ENTER EMPLOYEE COMPENSATION INFORMATION

18. Click **Open** to go to the compensation screen**.**

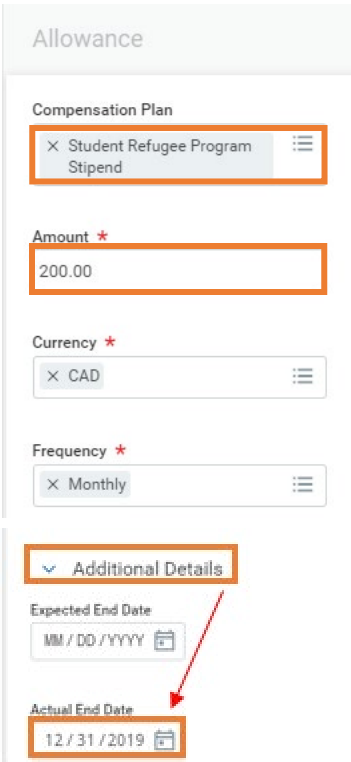



**Tip:** If you clicked out of the pop-up, navigate to your Workday inbox and continue the task from there.

19. Click the **X** in the Salary section and **Delete** to close it.



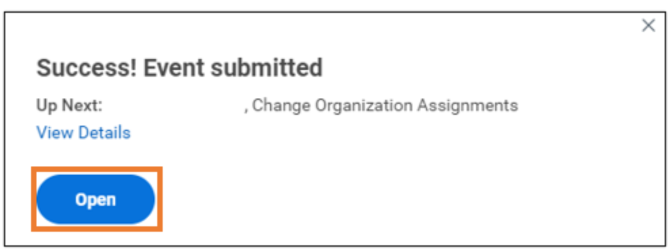

20. Scroll down to click **Add** in the *Allowance* section.
21. Click in the *Compensation Plan* field and select **All Compensation Plans** to choose **Student Refugee Program Stipend.**
22. In the Amount field, enter the applicable monthly payment amount
23. Click **Additional Details** underneath *Frequency* to expand the fields.
24. Enter the **Actual End Date** to be the same as the End Employment Date (i.e. the end date that was entered on the job details screen).




25. Click **Submit** to continue on to the account entry screen (Change Organization Assignment).

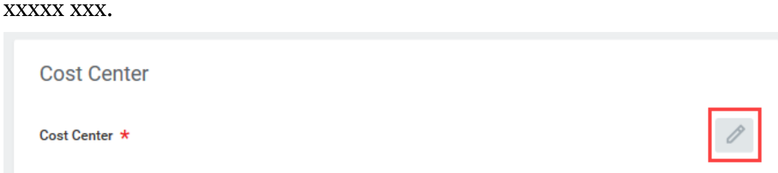
## ENTER CHANGE ORGANIZATION ASSIGNMENT

26. Click **Open.**

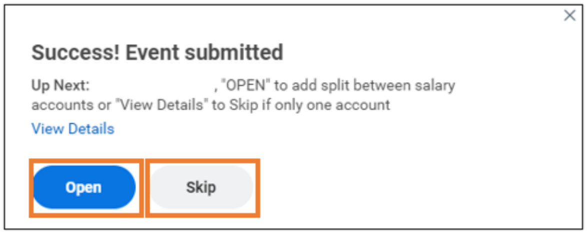



**Tip:** If you clicked out of the pop-up, navigate to your Workday inbox and continue the task from there.

27. In the *Cost Center* section, click the **Edit** icon and enter the **work order** and **activity** in the format xxxxx-xxxxx xxx.



28. Click **Submit.**
29. If there is only one applicable Cost Center, click **Skip** for *Add Split Between Salary Accounts*, then **OK** to send the hire to HR for review. If there is more than one cost center, click **Open** and see the steps below.




**Tip:** Leave the reason field blank for skipped fields. If you clicked Open or clicked out of the pop-up instead of Skipping, navigate to your Workday inbox and select the gear icon (task actions) in the top right of the Assign Costing Allocation inbox item and click **Skip This Task** and then **OK** on the next screen to skip.

**If there is more than one Cost Center:**

30. Click **Open** to enter additional salary accounts.
31. For the *Costing Allocation Level*, select **Worker and Position**.
32. Click **Add.**
33. Select the + button to add an additional row and enter the additional cost center into the *Worktags* field.
34. Enter the appropriate **Distribution Percent.**
35. Click **Submit** and **Done.** The initiation of this hire is now complete and will go to HR for review.

**Tip**: To view the status of your hire, type the employee's name into the main Workday search bar and press enter. Make sure All of Workday is selected under *Categories* and click the *Hire:(employee name)* link. Click the Process tab on the resulting screen and scroll down the table to see what part of the process the hire is in; OR find the submitted Hire event in the Archive section of your Workday inbox and click the Process tab (items are archived for 30 days).

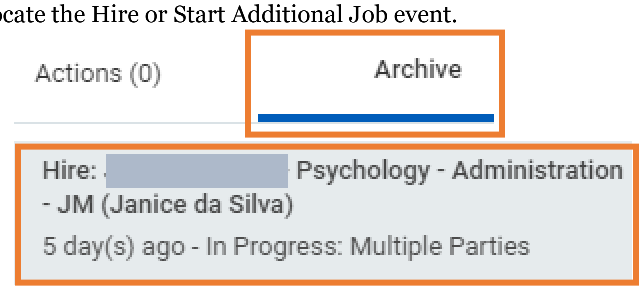
## CANCEL A HIRE

If a hire was submitted in error, this process can be cancelled and then resubmitted with the correct information if necessary.

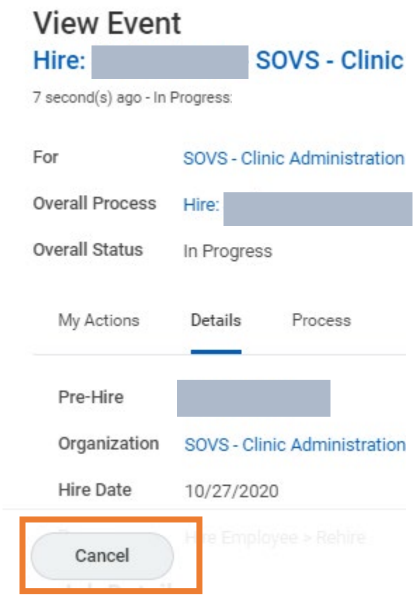
The hire can be cancelled in two ways:

**1. From the Archive section of your Workday Inbox:**

1. Locate the Hire or Start Additional Job event.



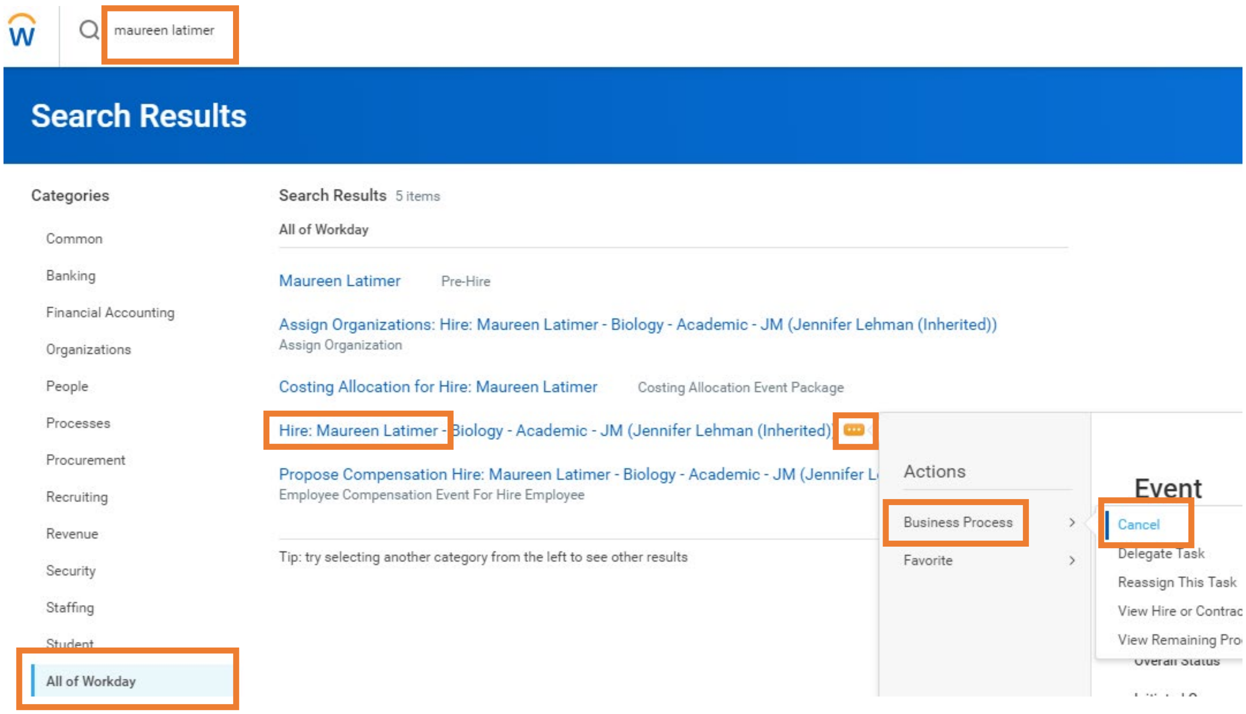
1. At the bottom of the screen, there will be the option to Cancel.
   **Note:** If you need to update a hire detail such as a start or end date prior to final approval, click Cancel to start over or contact the individual or team that the hire is awaiting approval with to have them send the hire back to you to correct and resubmit (click the Process tab to see who the hire is sitting with).




2. 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 the employee name into the Workday search bar:**

1. Type the employee's name into the main workday search bar and press enter on the keyboard.
2. Select **All of Workday** under *Categories* on the left-hand side.
3. 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).
4. Click the related actions (3 orange dots) and hover over **Business Process** to select **Cancel.**
5. Scroll down to the end of the hire details to enter a comment in the comment field box.
6. 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.




## HIRE TROUBLE SHOOTING

**What steps need to be submitted for a hire to go through for approvals?**

1. Hire Details screen
2. Social Insurance Number – only for brand new employees; skippable
3. Propose Compensation
4. Change Organization Assignments (cost center)
5. Add Split for Salary Accounts (costing allocations); skippable

**When will my hire be finalized?**

The hire will be finalized once it goes through all of 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).* You can monitor the process by checking the status of your hire.

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.

**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.

**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.

**How do I check the status of my hire?**

1. Type **event:** followed by the employee's name into the main Workday search bar and press **enter**.
2. Find the **Hire: Employee Name** event (i.e. Hire: John Doe) and click on it to go to the hire event details page.
3. 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.

**Tip:** If there is more than one hire event, click the related actions to view initiation date and status (i.e. in progress, cancelled, completed) to find the right event.

**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.

**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.

**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

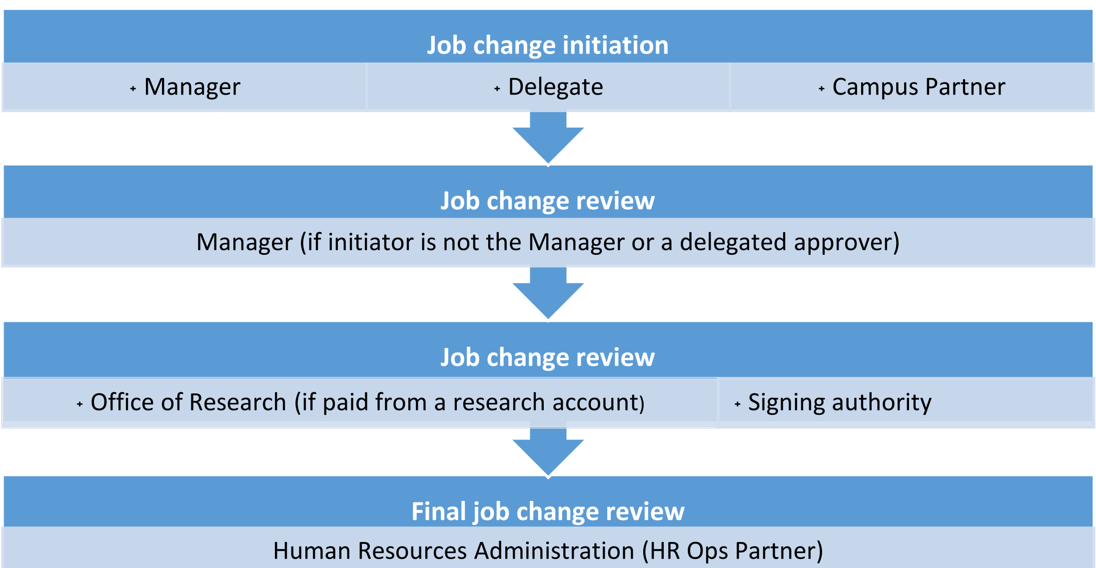
Individuals who qualify for the above payments will need to be hired into Workday as casual employees, following the steps in the Hire for a one-time payment user guide.

- 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.

**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.

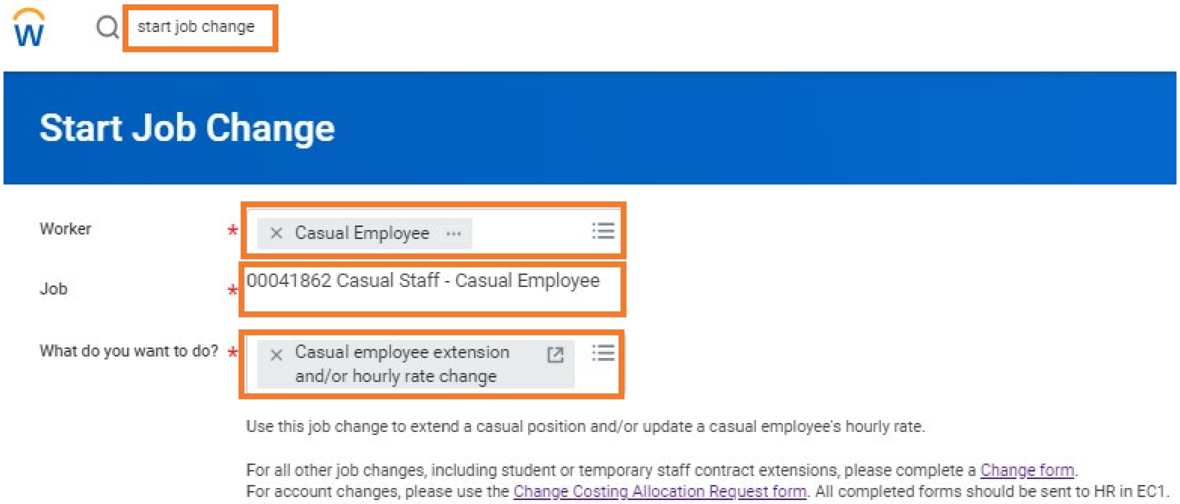
# CASUAL JOB CHANGE



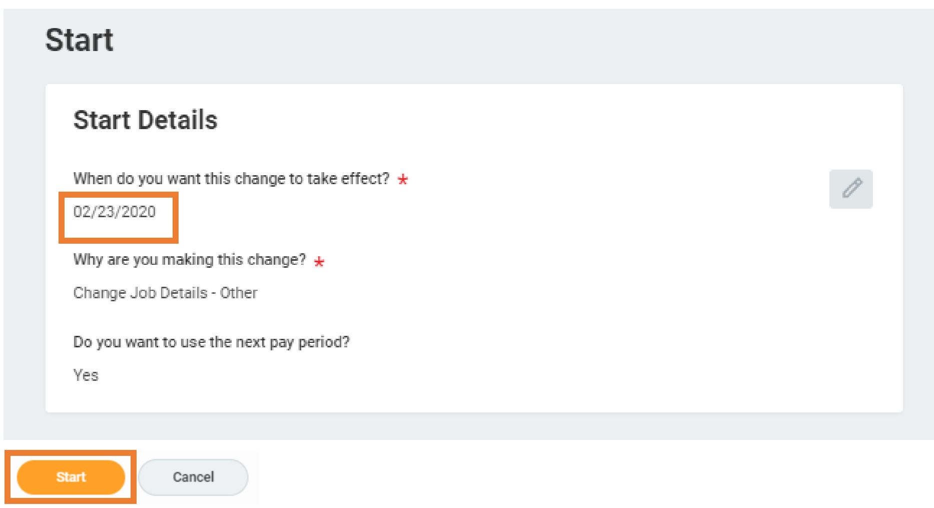

The steps outlined below will guide you through the steps to initiate a casual extension and/or pay rate change in Workday.

1. In the Workday search bar, type **casual job change** to initiate the job change task.
2. In the *Worker* field, enter the name of the casual employee you will be making the change for.
3. If they have more than one position, select the appropriate one from the *Job* drop down menu, otherwise this will default.

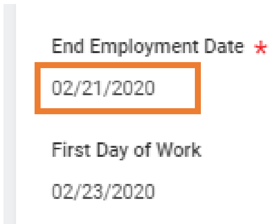
4. In the *What do you want to do* field, select **Casual employee extension and/or hourly rate change** and select **OK** at the bottom of the screen.




5. The date will default to the start of the next pay period. Leave as is or update it to when this change should take effect.
6. Click **Start.**




7. Scroll down the *Details* section to edit the **End Employment Date** (if applicable).
**Note:** The first day of work field will default to the job change date; the overall job record will not be updated with this start date.




8. If updating the hourly rate, scroll down to the *Hourly* section and click the Edit icon to enter a new rate.


9. Once the end date and/or hourly rate have been updated, click **Submit** to send this job change for review.

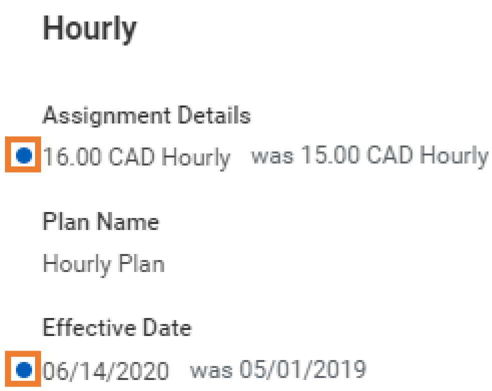
**Note:** if you are a campus partner, it will go to your manager and then to the cost center signing authority and Office of Research (if a research account). If you are the manager, it will go directly to the signing authority and Office of Research as applicable.

# CASUAL JOB CHANGE REVIEW

The steps outlined below will guide you through the review of casual pay rate changes and/or appointment extensions initiated in Workday. This process is only to be used for those two types of job change.

1. In Workday, navigate to your inbox to view the pending job change review task. 


2. Changes will be indicated with a blue dot and the updated value will be shown alongside the previous value.

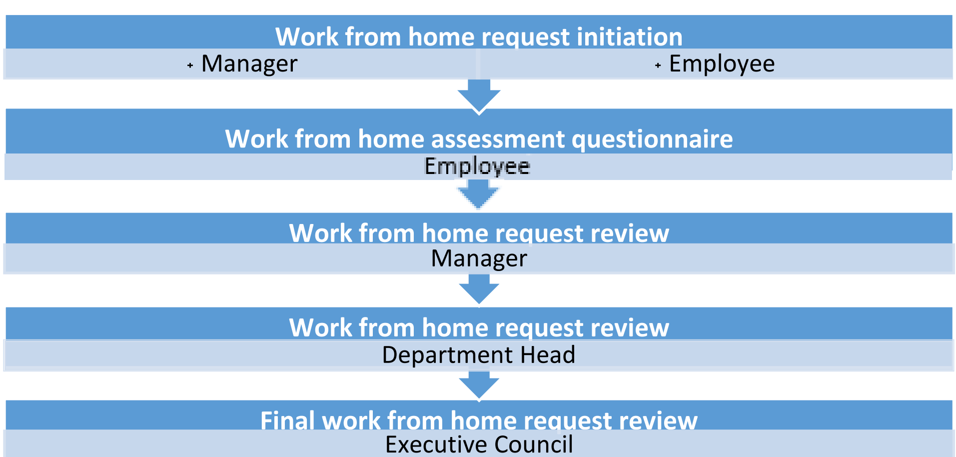



3. Review the changes and if OK, click the **Approve** button. If you do not approve, click the **Deny** button with a comment as to why. The initiator can then re-initiate with the appropriate changes if applicable.


# FLEXABLE WORK ARRANGEMENT REQUEST

Employees may be permitted to work from home for a maximum of four days per week, based on an annual review. Full guidelines can be found on the the Secretariat website.

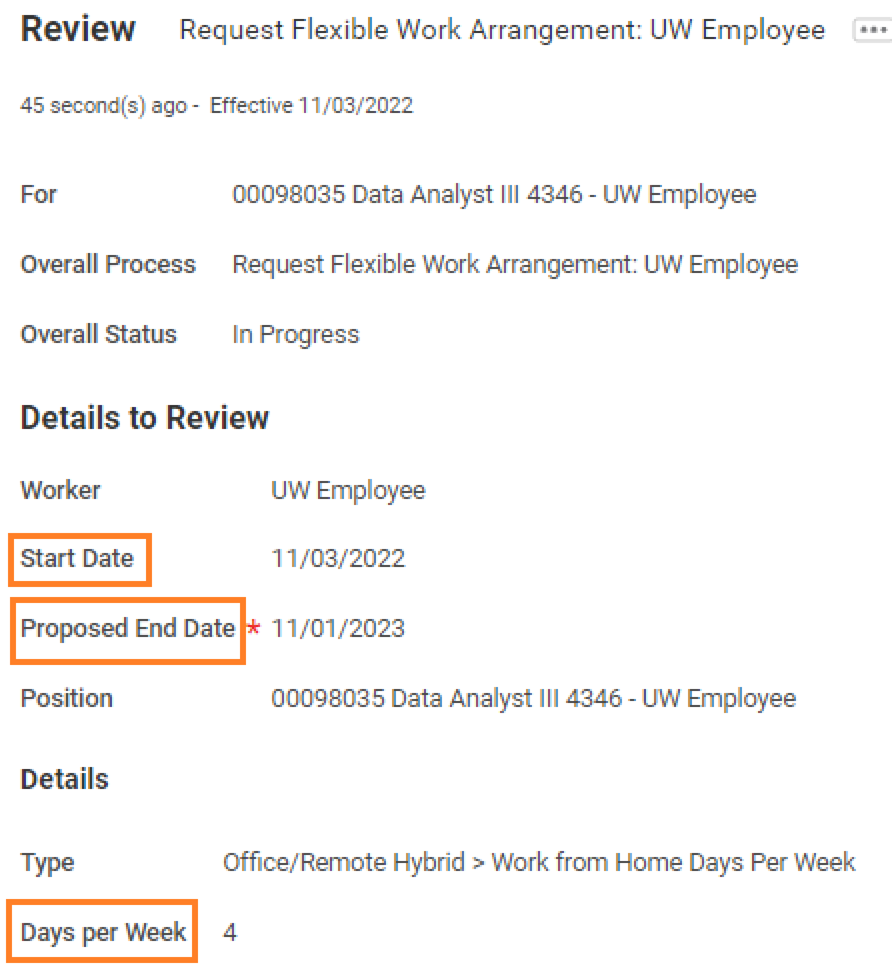
*Approval path:*



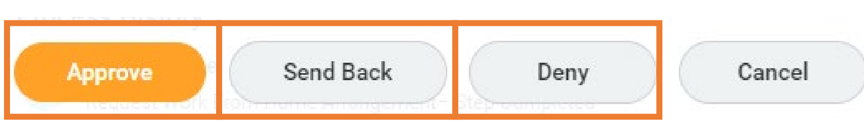
The following will guide you through the Flexible Work Arrangement Request review process in Workday.

1. From the Workday home page, click the **inbox** icon on the top right.


2. Review the *Request Flexible Work Arrangement* for the employee including the *Start Date* requested, *End Date* requested and *Days per Week*.




3. Once the information has been reviewed, the request can be *approved*, *sent back* to the employee, or *denied*.

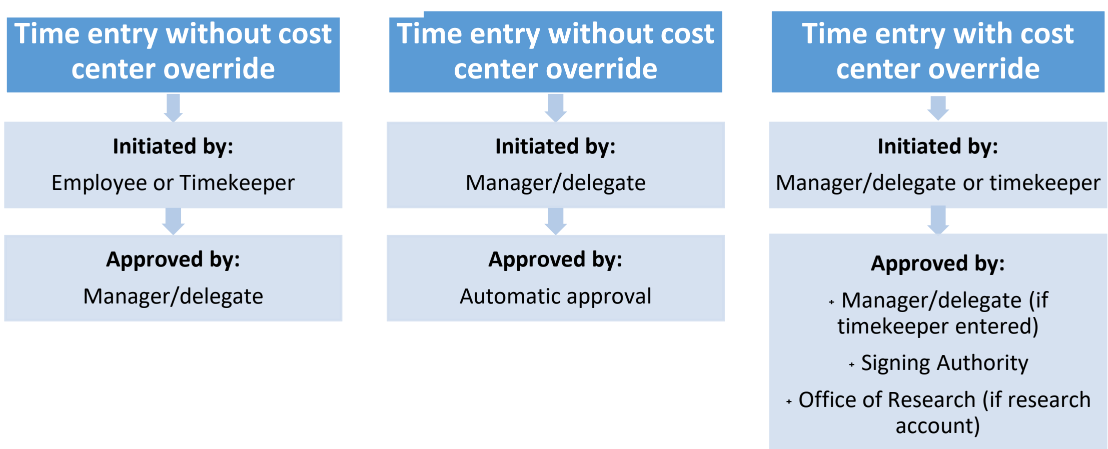


a. If the employee needs to revise the work from home arrangement details click **Send Back**. Enter a reason and then click **Submit** to send back the request.

Once fully approved, Work from home arrangements can be viewed from the worker profile by clicking the **Job** option from the left-hand menu and then the **Work from home arrangement** tab at the top.
To view all employees' work from home arrangements, type *UW CR Work from home details* into the Workday search bar to pull up a report.

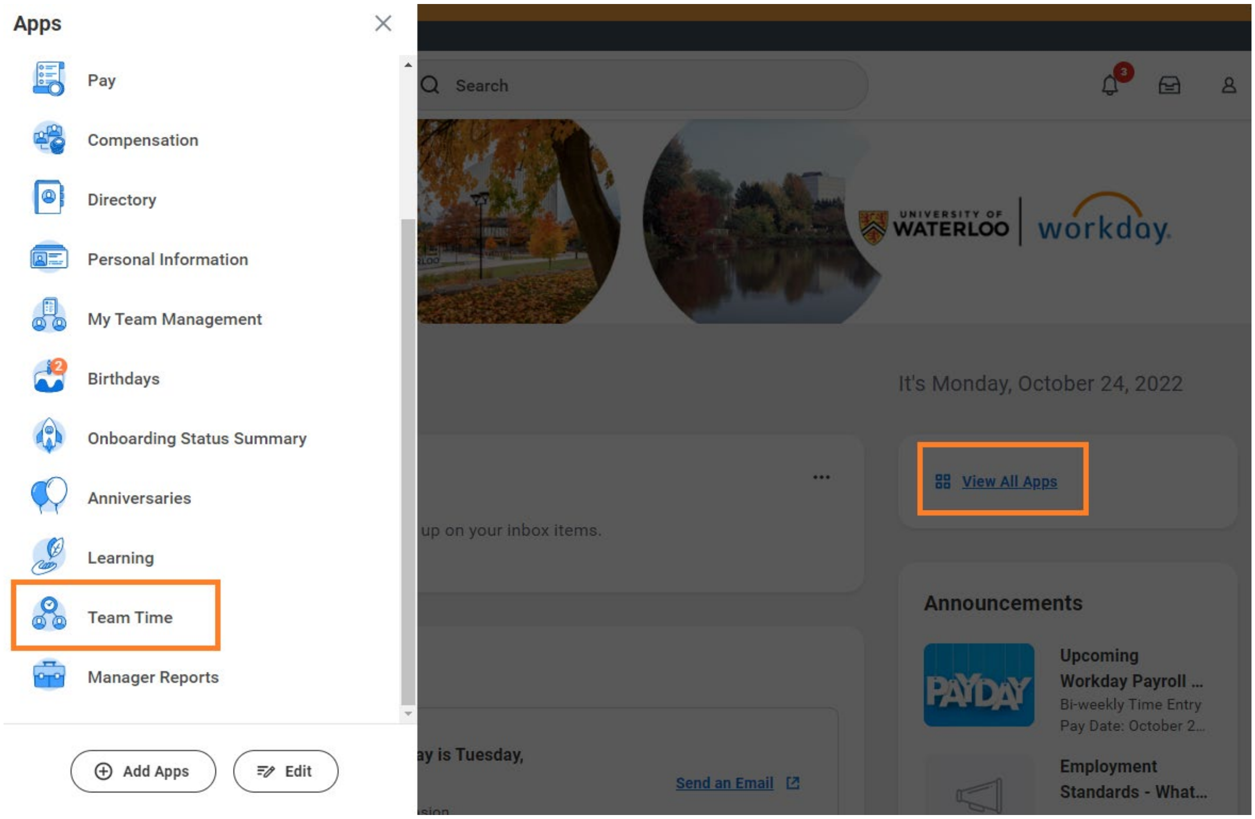
# TIME ENTRY AND APPROVAL

**Approval path:**

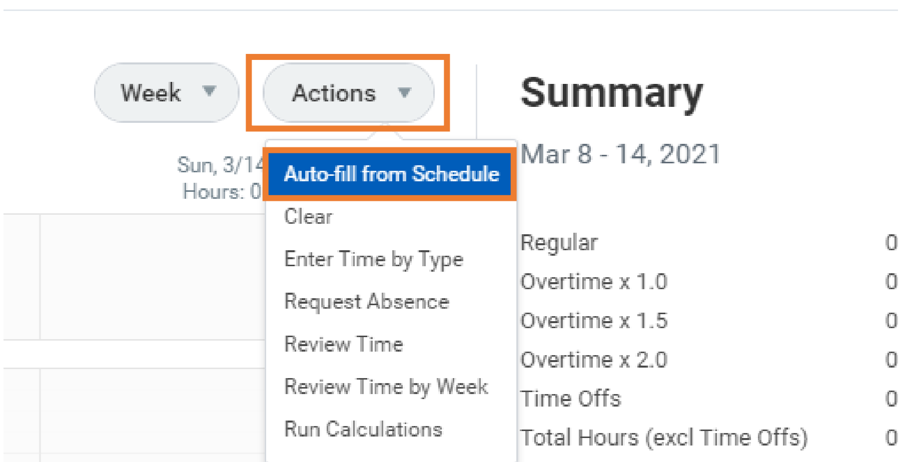



## ENTER OVERTIME FOR AN EMPLOYEE

1. On the Workday homepage, click **View All Apps** to go to the **Team Time** application.




2. Select **Enter Time for Worker** from the *Actions* menu.
3. Fill out the *Worker* and *Date* fields.
4. At the top right of the time entry calendar, click the **Actions** button to select **Auto-fill from Schedule**. This will fill in all regularly scheduled hours for the week.




**Note:** This screen displays the employee's regular scheduled hours.

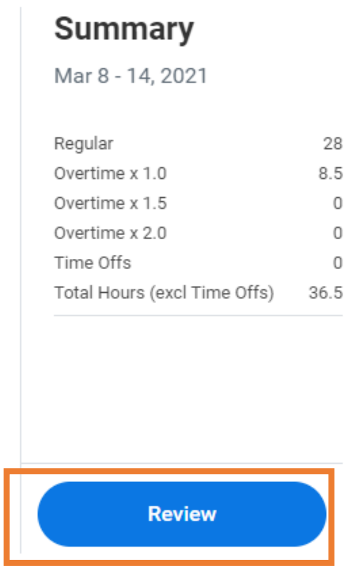
5. Click **OK** to populate the hours into the calendar.
   **Note:** Uncheck any stat holidays or vacation days.

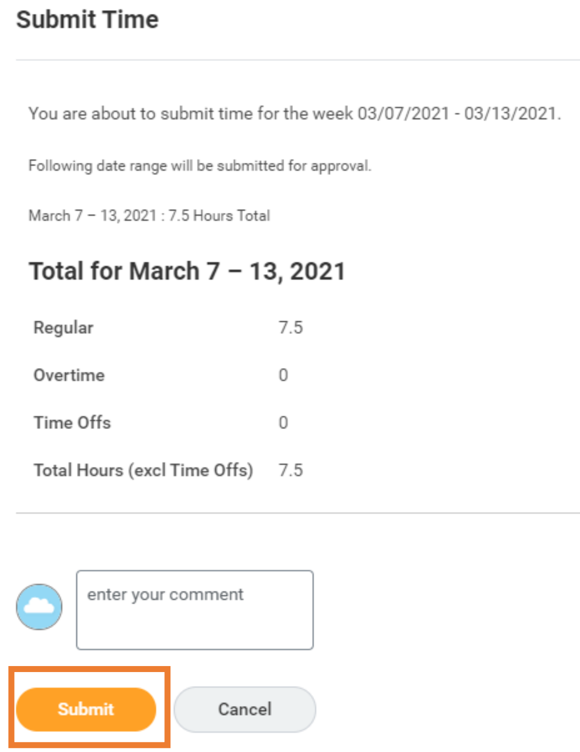
6. Select the portion of the day where the hours will be added (i.e. for hours worked past 4:30 p.m., select the afternoon portion of the applicable day) and update to include overtime hours worked.


**Note:** Leave *Payroll Flag* field blank. Populating this field will result in unpaid hours.

Enter a cost center override *only* if these hours are not paid from the employee's default account.

7. The hours entered for the week will display in the *Summary* section to the right of the time entry calendar.
8. Once all hours have been entered for the week, click **Review** to review and submit the hours.




## APPROVE OVERTIME FOR AN EMPLOYEE

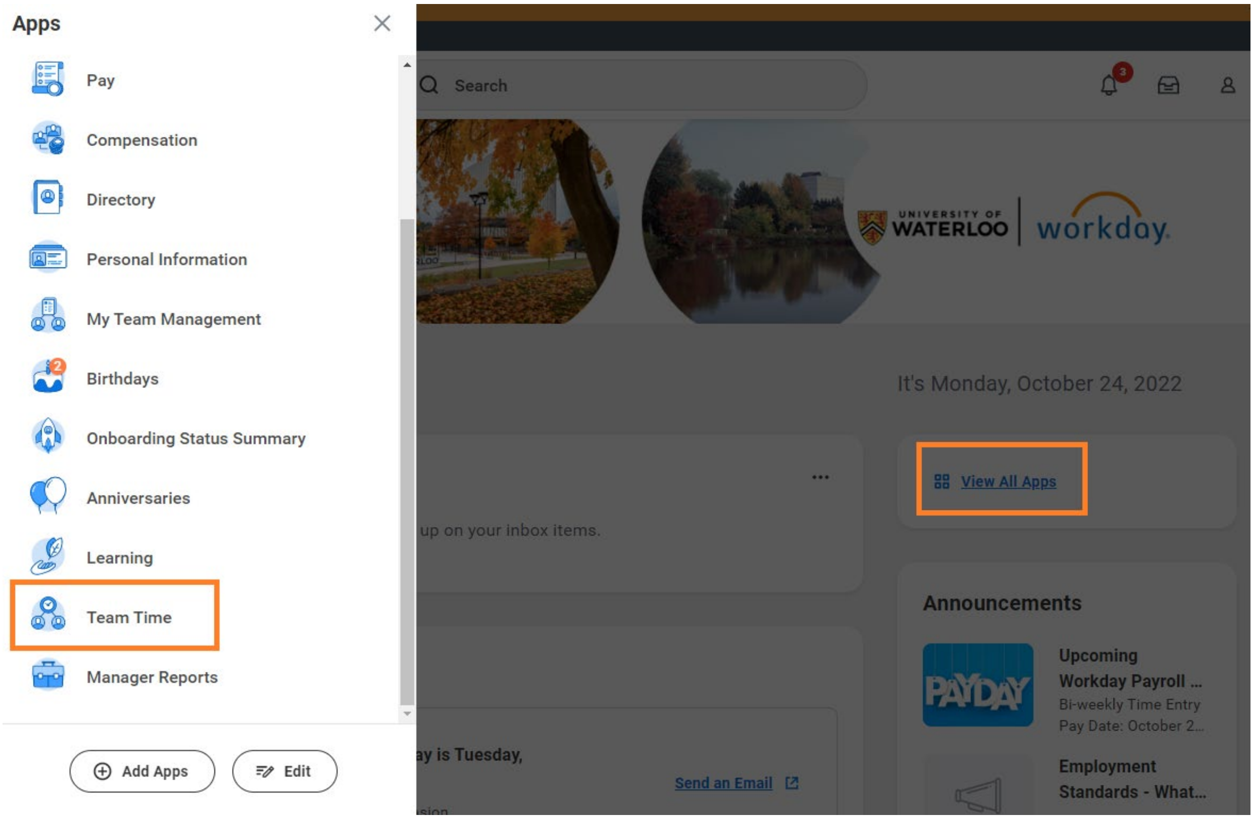
1. At the top right of the Workday screen, click the inbox icon.
2. Find the **Time Entry Approval** request.
3. Upon review, select the appropriate button at the bottom of the screen – *Approve, Send Back, Deny, Close*.

**Note:** Changes can be made by clicking the time entry submissions in the employee's time entry screen (*Team Time* > *Enter Time for Worker* task).

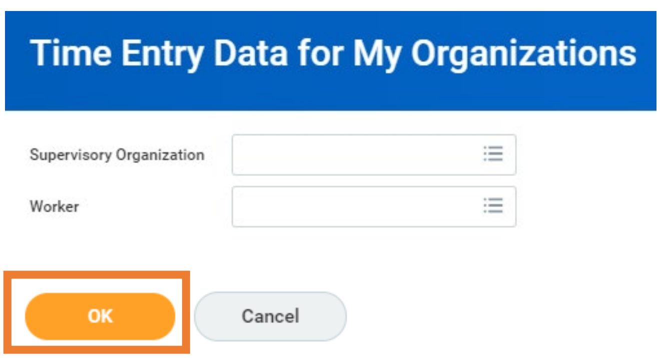
## VIEW COMPENSATION RATES AND DEFAULT ACCOUNTS FOR CASUAL STAFF

Use the Time Entry Data for My Organizations report to view employees' default hourly rates and default accounts prior to entering their time.

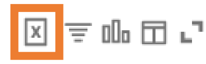
1. On the Workday homepage, click **View All Apps** to go to the **Team Time** application.




2. Under the *View* menu options, select **Time Entry Data for My Organizations.**
   **Note:** This report can also be accessed by typing the report name into the Workday search bar.
3. Leave the *Supervisory Organization* and *Worker* fields blank to view all employees you have time entry access for, or enter a specific organization(s) or worker(s) to view a narrowed list and click **OK**.

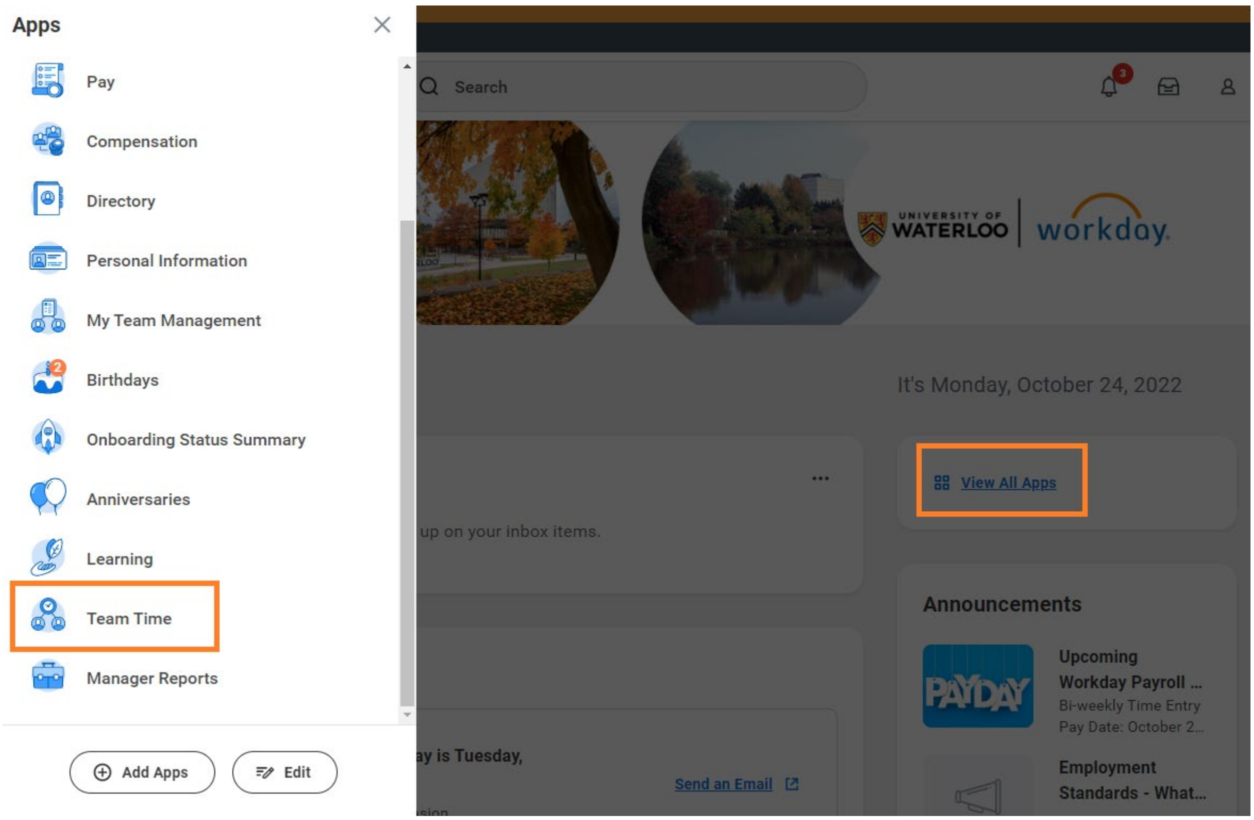



4. For each employee, view the employee ID, position(s), supervisory organization, rate, and default accounts to know whether or not the rate or account needs to be overridden when entering time.

**Tip:** Export this report to Excel by clicking the Excel symbol above the table  or duplicate the tab (right click the browser tab and select duplicate) to have the report open in another window while performing time entry.

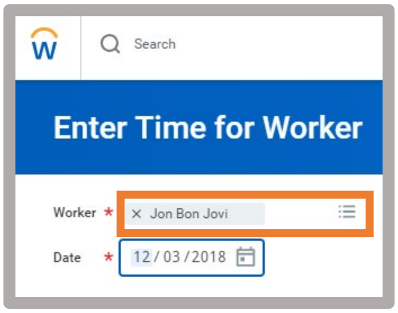
## ENTER TIME FOR CASUAL STAFF

1. On the Workday homepage, click **View All Apps** to go to the **Team Time** application.

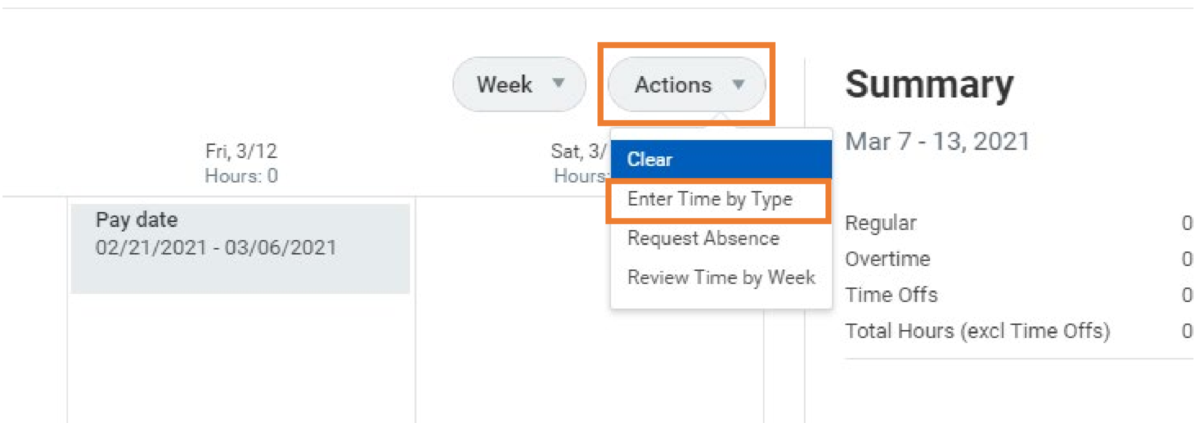



2. Select **Enter Time for Worker** from the Actions menu.

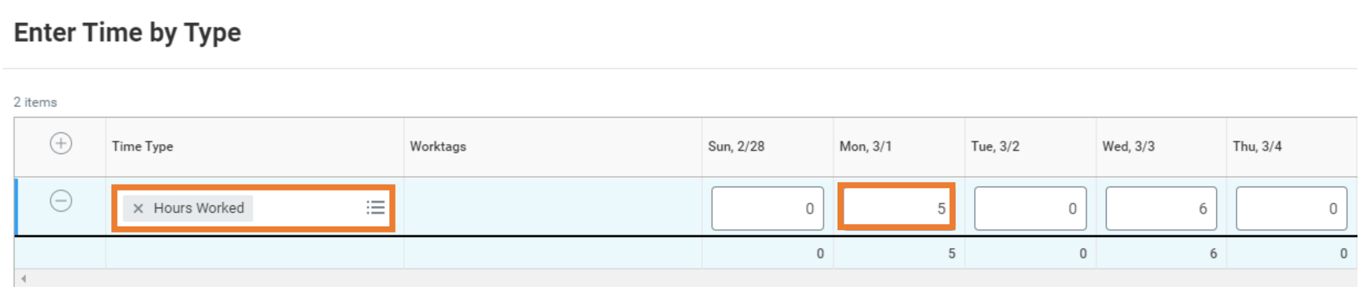
3. Fill out the *Worker* and *Date* fields and click **OK** to continue.




4. Click the day on the time entry calendar for which you want to enter time **OR** to enter time for the week, click **Actions** at the top right of the calendar and select **Enter Time by Type**.

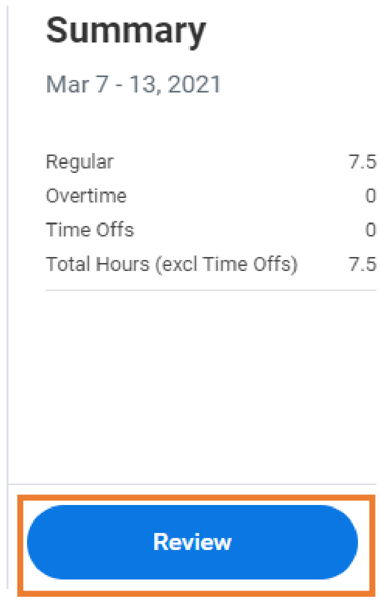


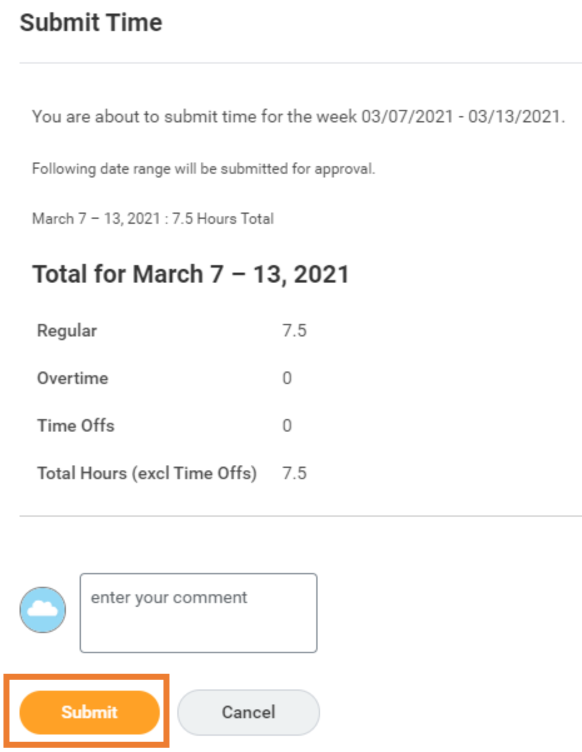

5. Under *Time Type*, select **Hours Worked** and enter the daily hours worked for the week and click **OK** at the bottom to return to the time entry calendar.
**Note:** You must enter time in hours, i.e. half an hour would be entered as .5




6. The hours entered for the week will display in the *Summary* section to the right of the time entry calendar.
**Note:** Leave *Payroll Flag* field blank. Populating this field will result in unpaid hours.
Enter a cost center override *only* if these hours are not paid from the employee's default account.

7. Once all hours have been entered for the week, click **Review** to review and submit the hours.



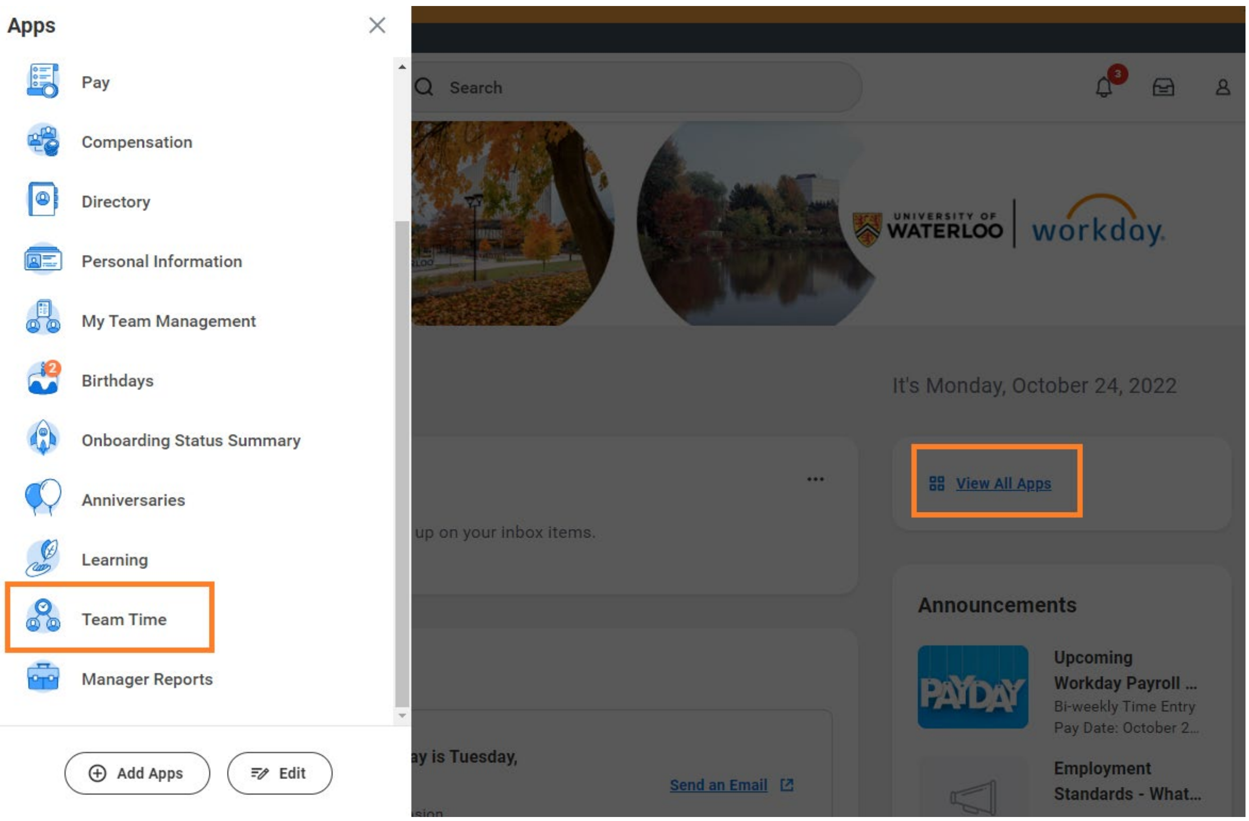




**Note:** If time entry is locked for payroll processing, you will receive an Alert notification and there will be no Review button to select. To submit these hours you will need to wait until time entry re-opens (typically the day before the current pay date).

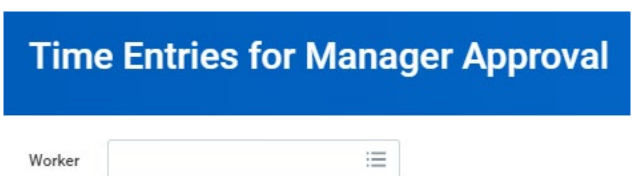
## APPROVE TIME FOR CASUAL STAFF

Submitted hours can be approved directly from the Workday inbox, or by following the instructions below to first view the compensation elements of the submitted time.

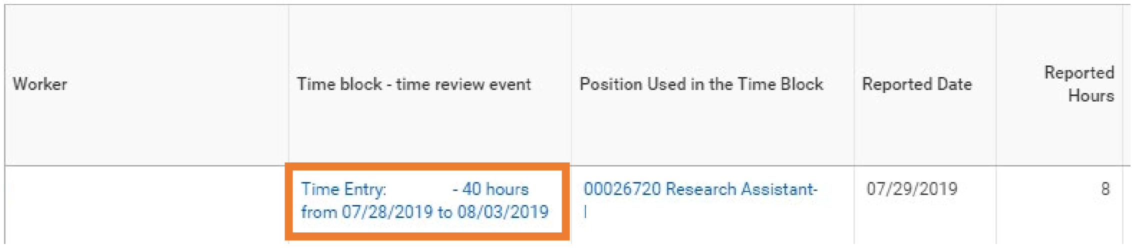
1. On the Workday homepage, click **View All Apps** to go to the **Team Time** application.



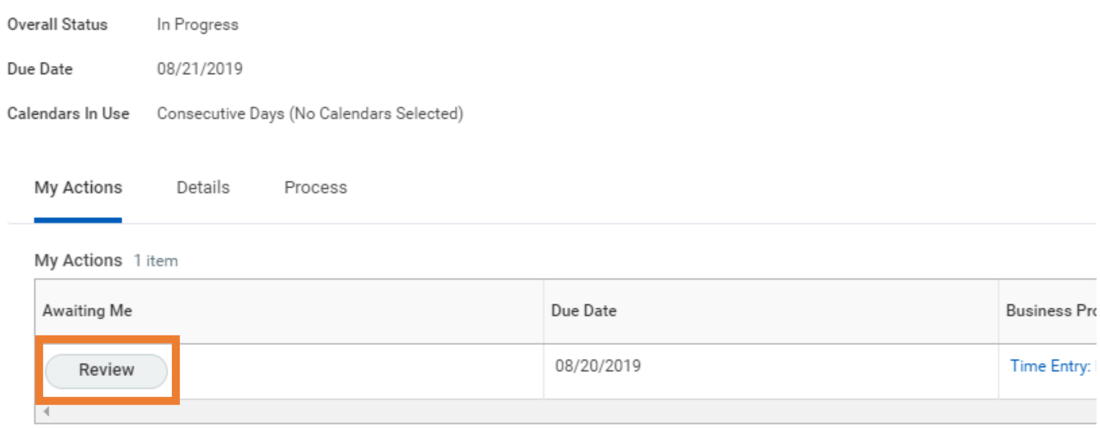

2. Under the *View* menu options, select **Time Entries for Manager Approvals.**
   **Note:** This report can also be accessed by typing the report name into the Workday search bar.
3. Leave the *Worker* field blank to view all employees you have time entry approvals for, or enter a specific worker to view a narrowed list and click **OK**.

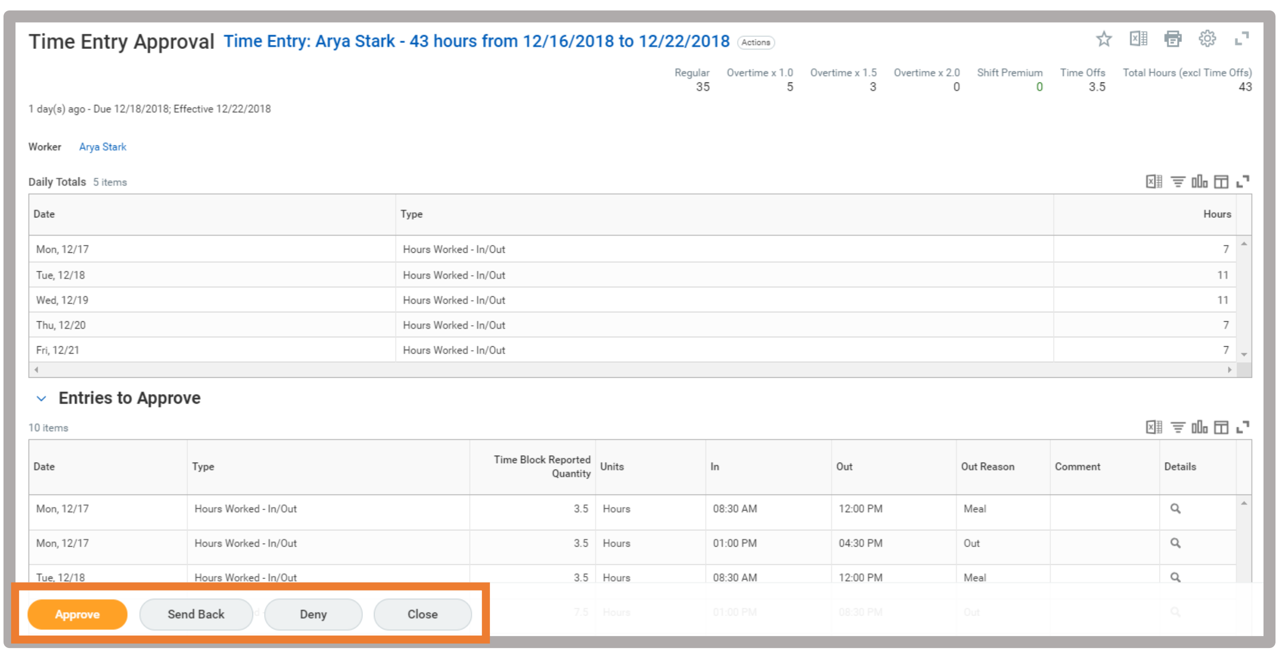



4. Review the number of hours, compensation amounts and accounts (cost center).
   **Note:** Multiple time entries for the same employee will have a total amount at the end of their list of entries.
5. When ready to action the time entry, click on the *Time Block – time review* event in the second column.




6. Click **Review** to bring up the approval screen and *Approve, Send Back,* or *Deny* as applicable.

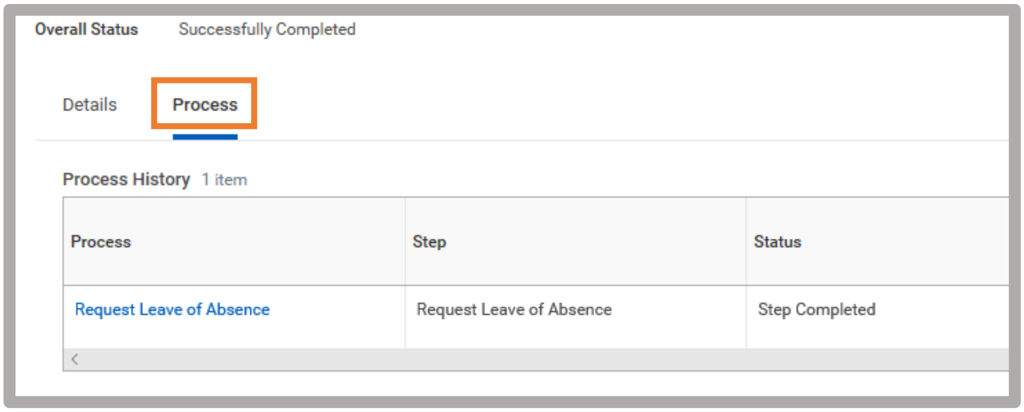



## VIEW STATUS OF REQUEST

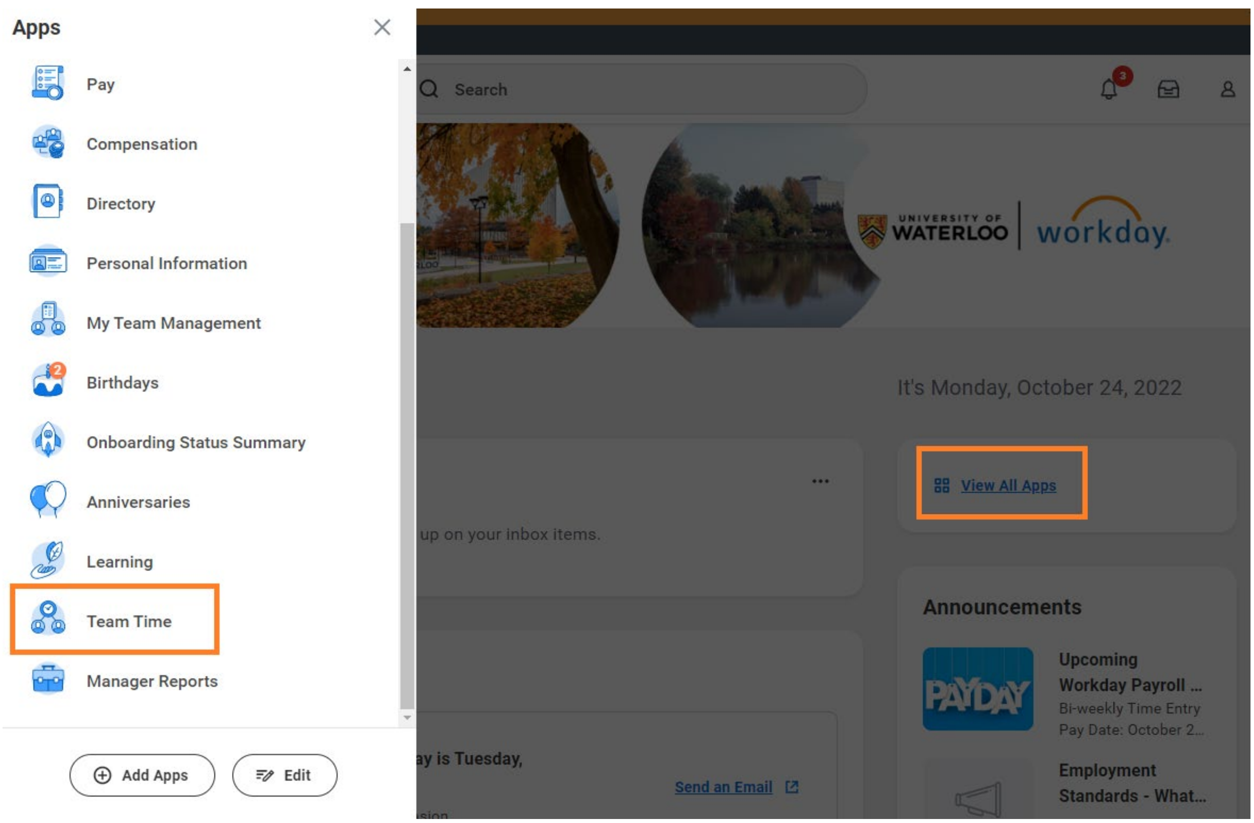
1. Go to the Workday inbox and click on the **Archive** tab.

2. Find and click on the relevant request in archive list.
3. Within the *View Event* screen, click on the **Process** tab to view *Process History*.




## CHANGE AN APPROVED REQUEST FOR AN EMPLOYEE

1. On the Workday homepage, click **View All Apps** to go to the **Team Time** application.



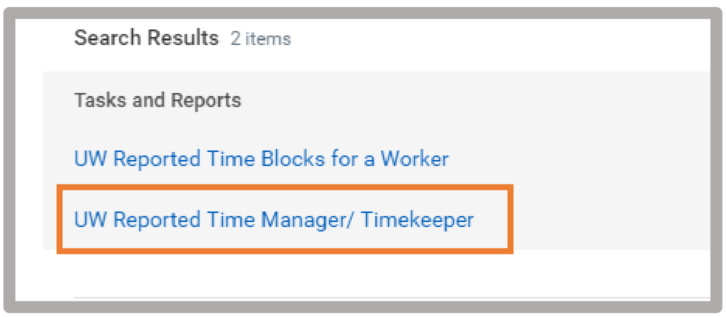

2. Click **Enter Time for Worker** from the Actions menu.
3. Fill out the *Worker* and *Date* fields. Click OK to continue.

4. From the time entry calendar, click on the date that hours need to be modified to make the necessary changes in the resulting window.
5. Once complete, click **Submit.**
6. Review *Details and Process* to confirm change and select **Done**.

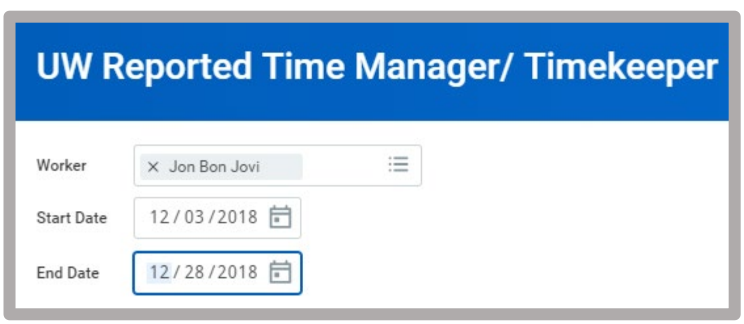
## VIEW HOURS SUBMITTED FOR AN EMPLOYEE

1. Enter the following report name in the search bar on the home page: **UW Reported Time**

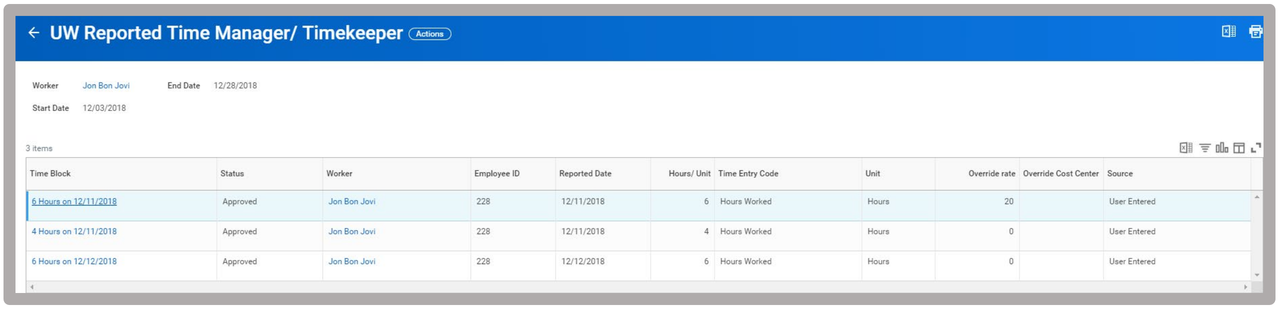

2. Select UW Reported Time Manager / Time Keeper Report




3. Enter the worker name and time period for Reported time




4. Click **OK** to view the report.




## TIME ENTRY TROUBLE SHOOTING

**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.

**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.

**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.

**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.

**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.

**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.

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

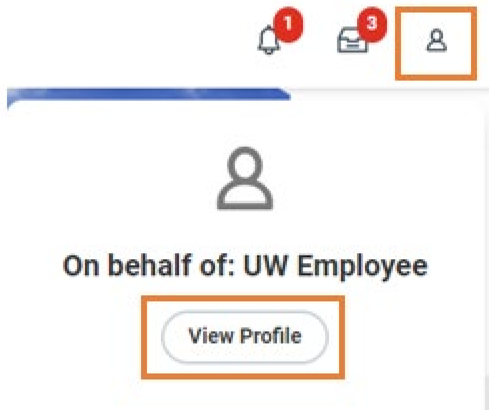
- The end employment date does not terminate employment but is used for reporting and mass termination actions by the HR Administration team. If you are entering time for an employee whose end employment date has passed, the time entry will still be passed to payroll for processing.

# DELEGATION

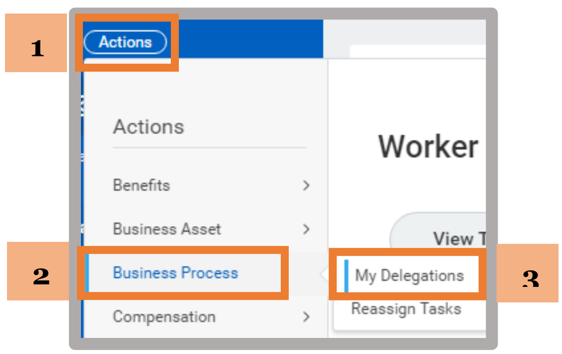
Various tasks can be delegated in Workday such as an entry task, inbox reviews and approvals, or both. The steps below will help guide you through setting up a delegation for tasks associated with Hire, Time Entry, Time Off, and Terminations.

## DELEGATE HIRE TASKS

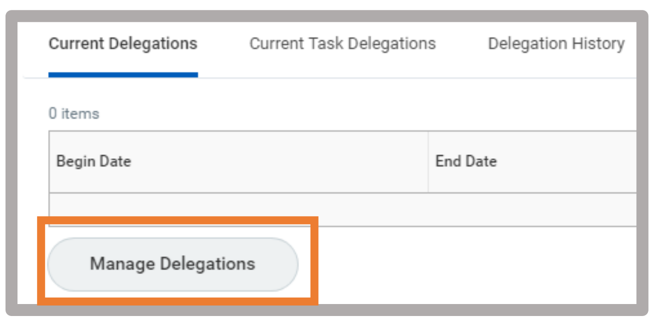
1. At the top right of the Workday screen, click the **profile icon** and select **View Profile**.




2. From your *Worker Profile*, select **Actions** and hover over **Business Process** to select **My Delegations**.



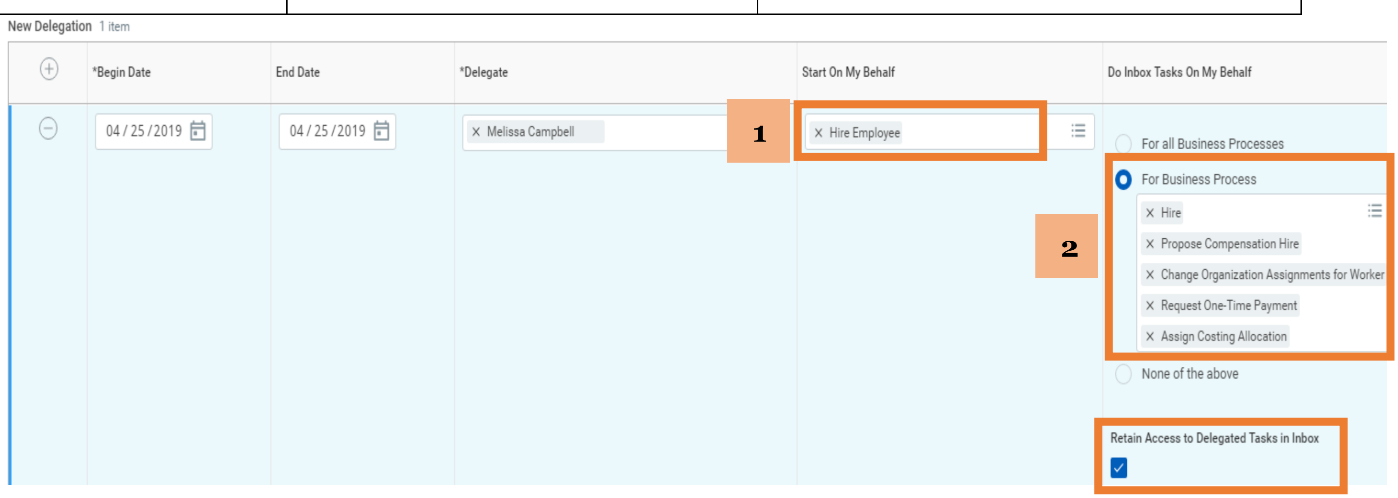

3. Click **Manage Delegations** to continue.




4. Enter *Begin Date* and *End Date* and type the delegate's name in the **Delegate* field. (Note: you must select an end date.)
5. See the options below for next steps depending on the task(s) you want to delegate.

| **If you wish your delegate to…** | **Then under:** 1. Start On My Behalf | **And under:** 2. Do Inbox Tasks On My Behalf |
|---|---|---|

| | | |
|---|---|---|
| 1. Be able to only **initiate** a hire | Click the prompt and select **By Business Process Type > Hire > Hire Employee.** | Select **For Business Process** and:<br>a) Type **One** in the search area and select **Request One-Time Payment**<br>b) Type **Assign** and select **Assign Costing Allocation** |
| 2. Be able to only **approve** a hire | Leave the field blank. | Select **For Business Process** and:<br>a) Type **Hire** in the search area and select **Hire** and **Propose Compensation Hire**.<br>b) Type **Organization** and select **Change Organization Assignments for Worker**<br>c) Type **One** in the search area and select **Request One-Time Payment.**<br>d) Type **Assign** and select **Assign Costing Allocation** |
| 3. Be able to both **initiate and approve** a hire | Click the prompt and select **By Business Process Type > Hire > Hire Employee.** | Select **For Business Process** and:<br>a) Type **Hire** in the search area and select **Hire** and **Propose Compensation Hire**.<br>b) Type **Organization** and select **Change Organization Assignments for Worker**<br>c) Type **One** in the search area and select **Request One-Time Payment.**<br>d) Type **Assign** and select **Assign Costing Allocation** |



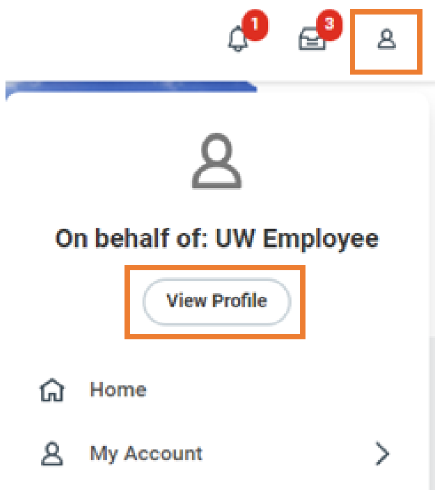

6. Click **Retain Access to Delegated Tasks in Inbox** (this will allow both you and the delegate to receive inbox tasks).

Note: if you retain access, once someone completes a task, it will disappear from both inboxes but will show in the archive section of you inbox.

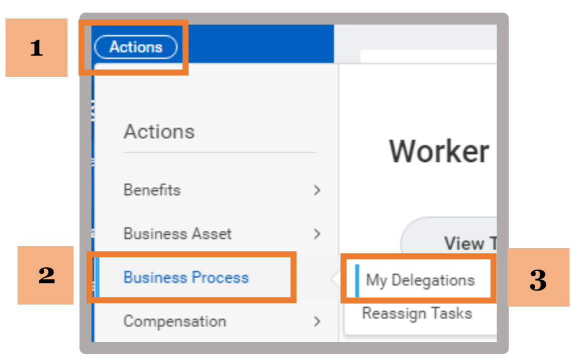
7. Click **Submit**.

## DELEGATE TIME ENTRY TASKS

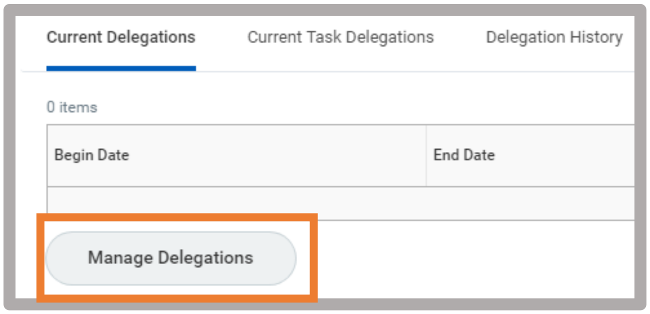
1. At the top right of the Workday screen, click the **profile icon** and select **View Profile**.




2. From your worker profile, select **Actions** and hover over **Business Process** to select **My Delegations**.

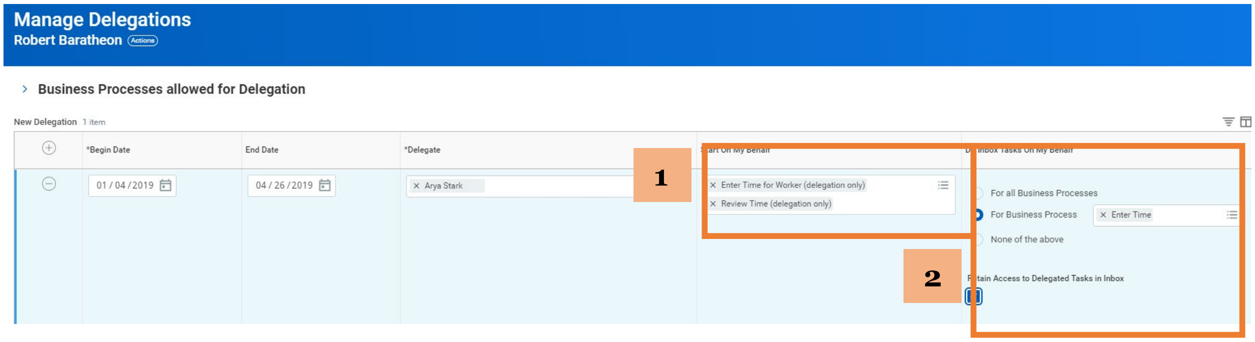



3. Click **Manage Delegations** to continue.




4. Enter *Begin Date* and *End Date* and type the delegate's name in the **Delegate* field. (Note: you must select an end date.)
5. See the options below for next steps depending on the task(s) you want to delegate.

| **If you wish your delegate to…** | **Then under:** 1. Start On My Behalf | **And under:** 2. Do Inbox Tasks On My Behalf |
|---|---|---|
| 1. Be able to only **initiate** time entry on behalf of your employees | Click the prompt and select **By Business Process Type > Enter Time > Enter Time for Worker (delegation only).** | Click **None of the above** |
| 2. Be able to only **approve** time entry for your employees | Leave the field blank. | **For Business Process** select **By Module>Time Core>Enter Time** or type in *Enter Time*. |
| 3. Be able to both **initiate and approve** time entry for your employees | Click the prompt and select **By Business Process Type > Enter Time > Enter Time for Worker (delegation only).** | Select **For Business Process** and select **By Module>Time Core>Enter Time** or type in *Enter Time*. |



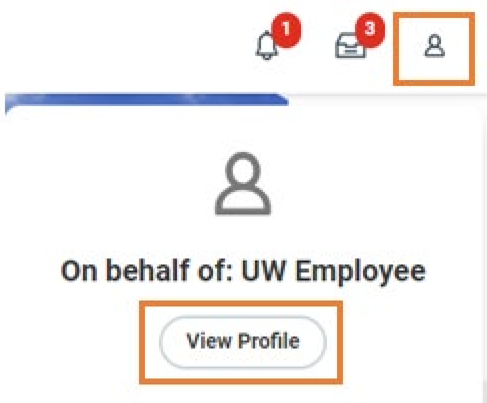

6. Click **Retain Access to Delegated Tasks in Inbox** (this will allow both you and the delegate to receive inbox tasks).

   **Note:** if you retain access, once someone completes a task, it will disappear from both inboxes but will show in the archive section of you inbox.

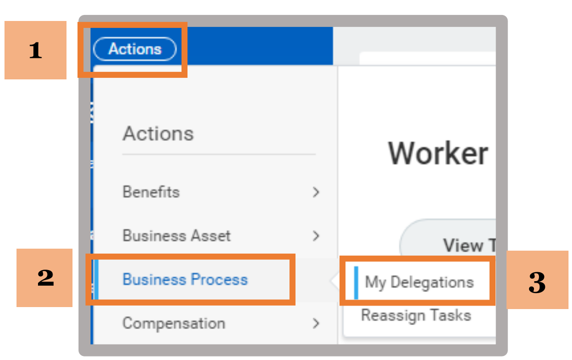
7. Click **Submit.**

## DELEGATE ABSENCE AND LEAVE TASKS

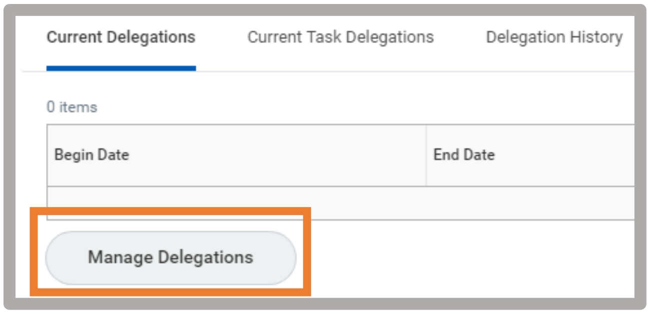
1. At the top right of the Workday screen, click the **profile icon** and select **View Profile**.




2. From your worker pofile, select **Actions** and hover over **Business Process** to select **My Delegations**.



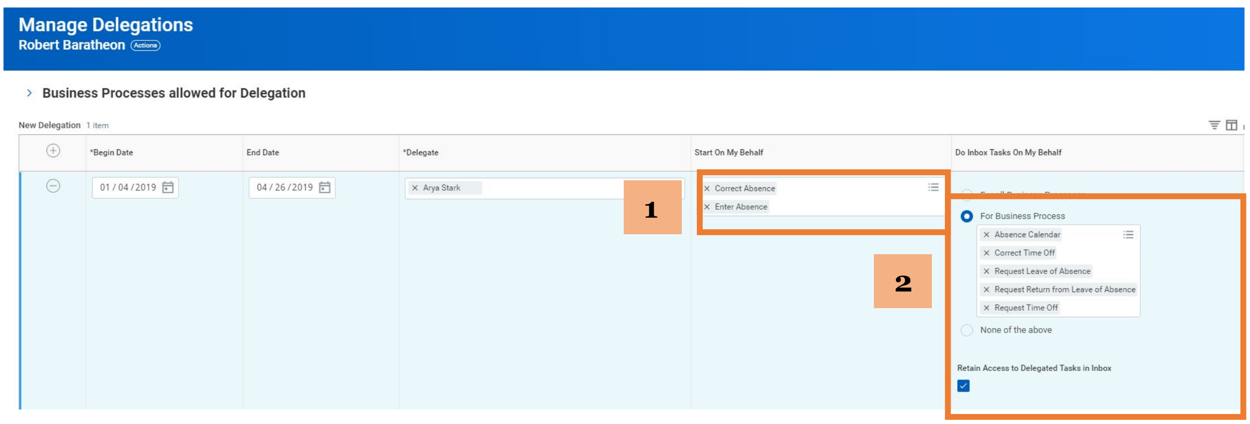
3. Click **Manage Delegations** to continue.




4. Enter *Begin Date* and *End Date* and type the delegate's name in the **Delegate* field. (Note: you must select an end date.)
5. See the options below for next steps depending on the task(s) you want to delegate.

| **If you wish your delegate to…** | **Then under:** 1. Start On My Behalf | **And under:** 2. Do Inbox Tasks On My Behalf |
|---|---|---|
| 1. Be able to only **initiate** absence and leave requests on behalf of your employees | Click the prompt and select **By Business Process Type > Absence Calendar>Correct Absence/Enter Absence.** | Click **None of the above** |
| 2. Be able to only **approve** absence and leave requests for your employees | Leave the field blank. | **For Business Process** and in the search area type *Absence* and press enter to select:<br><br>a) **Absence Calendar**<br>b) **Correct Time Off**<br>c) **Request Leave of Absence**<br>d) **Request Return from Leave of Absence**<br>e) **Request Time Off** |

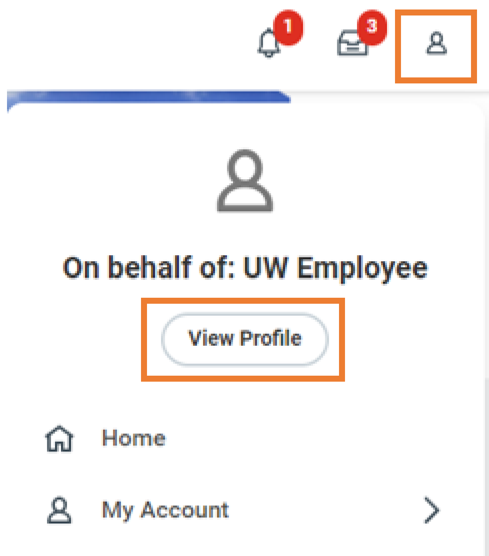
| | | |
|---|---|---|
| 3. Be able to both **initiate and approve** absence and leave requests for your employees | Click the prompt and select **By Business Process Type > Absence Calendar>Correct Absence/Enter Absence.** | **For Business Process** and in the search area type *Absence* and press enter to select:<br><br>a) **Absence Calendar**<br>b) **Correct Time Off**<br>c) **Request Leave of Absence**<br>d) **Request Return from Leave of Absence**<br>e) **Request Time Off** |



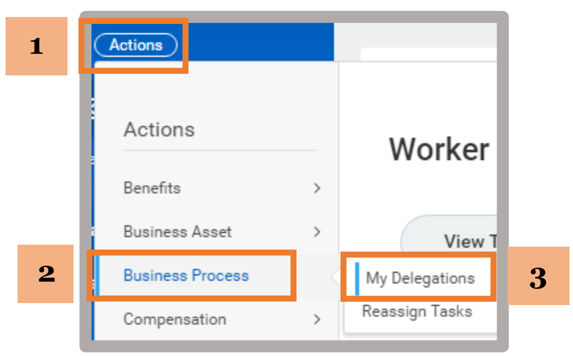

6. Click **Retain Access to Delegated Tasks in Inbox** (this will allow both you and the delegate to receive inbox tasks).
   **Note:** if you retain access, once someone completes a task, it will disappear from both inboxes but will show in the archive section of you inbox.
7. Click **Submit.**

## DELEGATE TERMINATION AND RESIGNATION TASKS

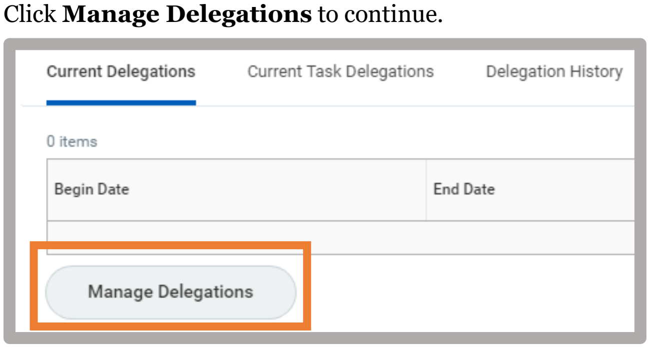
1. At the top right of the Workday screen, click the **profile icon** and select **View Profile**.




2. From your worker profile, select **Actions** and hover over **Business Process** to select **My Delegations**.

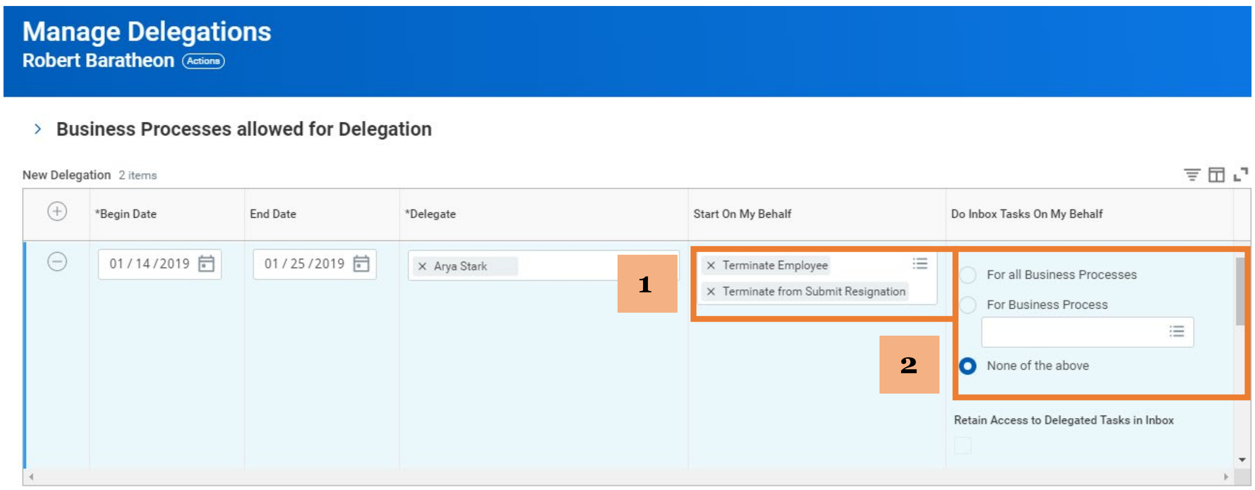



3. Click **Manage Delegations** to continue.




4. Enter *Begin Date* and *End Date* and type the delegate's name in the **Delegate* field. (Note: you must select an end date.)
5. See the options below for next steps depending on the task(s) you want to delegate.

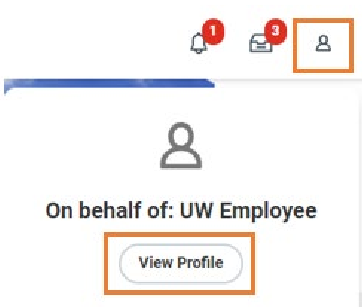
| If you wish your delegate to… | **Then under:** 1. Start On My Behalf | **And under:** 2. Do Inbox Tasks On My Behalf |
|---|---|---|
| Be able to only **initiate** termination/resignation actions | Click the prompt and select **By Business Process Type > Termination > Terminate Employee/Terminate from Submit Resignation** | Click **None of the above** |



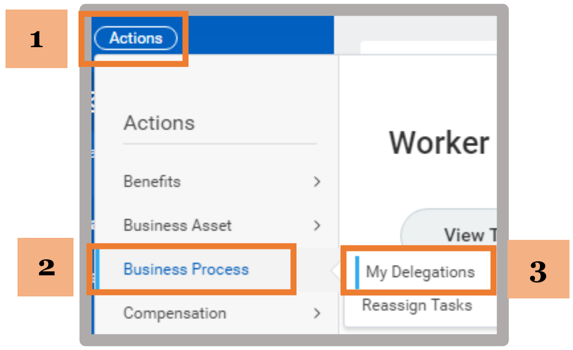

8. Click **Retain Access to Delegated Tasks in Inbox** (this will allow both you and the delegate to receive inbox tasks).
   **Note:** if you retain access, once someone completes a task, it will disappear from both inboxes but will show in the archive section of you inbox.
9. Click **Submit.**

## DELEGATE ALL TASKS

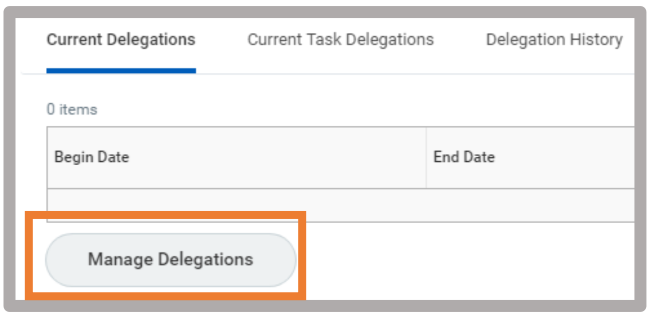
1. At the top right of the Workday screen, click the **profile icon** and select **View Profile**.



2. From your worker profile, select **Actions** and hover over **Business Process** to select **My Delegations**.

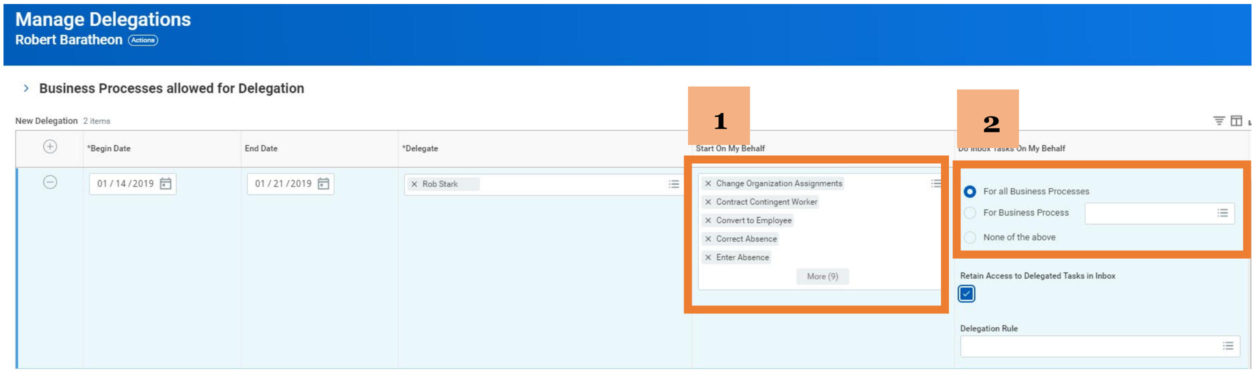



3. Click **Manage Delegations** to continue.




4. Enter *Begin Date* and *End Date* and type the delegate's name in the **Delegate* field. (Note: you must select an end date.)
5. See the options below for next steps depending on the task(s) you want to delegate.

| **If you wish your delegate to…** | **Then under:** 1. Start On My Behalf | **And under:** 2. Do Inbox Tasks On My Behalf |
|---|---|---|
| 1. Be able to **initiate** all business processes **and** complete inbox tasks | Click the prompt and select **All> Select all processes**. | Click **For All Business Processes**. |
| 2. Be able to only complete Inbox tasks | Leave the field blank. | Click **For All Business Processes**. |




6. Click **Retain Access to Delegated Tasks in Inbox** (this will allow both you and the delegate to receive inbox tasks).
   **Note:** if you retain access, once someone completes a task, it will disappear from both inboxes but will show in the archive section of you inbox.
7. Click **Submit.**

## DELEGATION TROUBLE SHOOTING

**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.

**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. 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.

**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

**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.

# RESIGNATION OR RETIREMENT

The steps listed below will help you through approving and submitting a resignation or retirement.

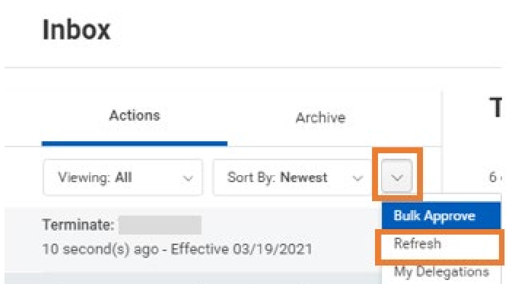
## APPROVE RESIGNATION OR RETIREMENT

1. From the Workday inbox find the **Submit Resignation** request.
2. Upon review, select the appropriate **Action** button at the bottom of the screen – *Approve, Send Back, Deny, Cancel.*

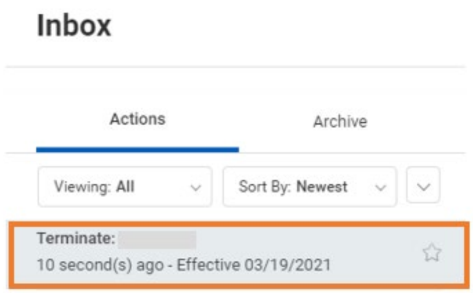
**After approving the employee resignation, you now need to complete the termination in Workday by following the steps below.**

**Note:** The employee record will not be terminated if the termination task below is not complete.

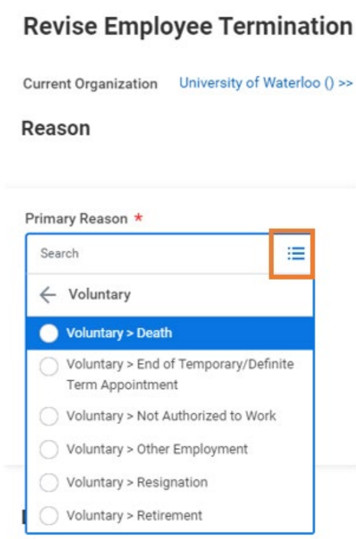
3. Refresh your inbox by clicking the drop down menu caret beside *Sort by: Newest* or refreshing your browser screen.




4. Click on the Terminate: *Employee Name* task.




5. Enter the *Primary Reason* for termination as Voluntary> Resignation, unless there is another more appropriate reason, i.e., if the employee is retiring, select Retirement.

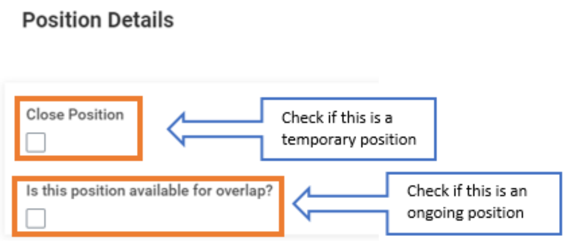



6. Confirm the termination dates.

**Note:** The dates will populate based on the resignation dates submitted.

7. If the terminating employee is temporary (fixed term), check the *Close Position* check box.

8. If the terminating a staff employee in a regular position, check the *Position available for overlap* check box.



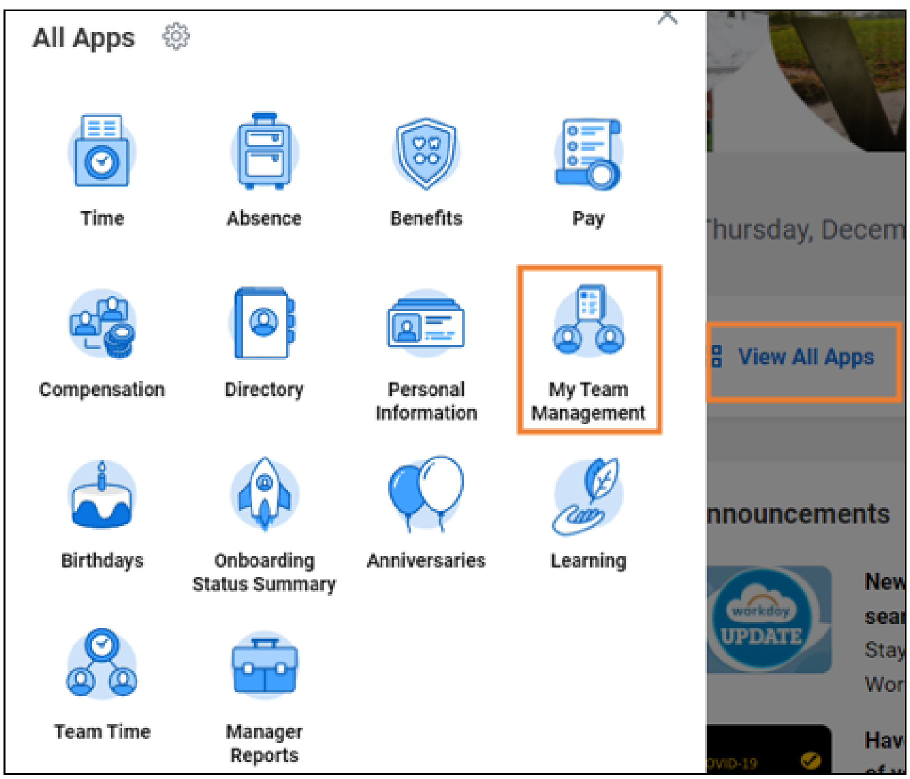

**Note:** Only PM positions will have the close and overlap options.

9. Upload any applicable documents, i.e. resignation letter/email

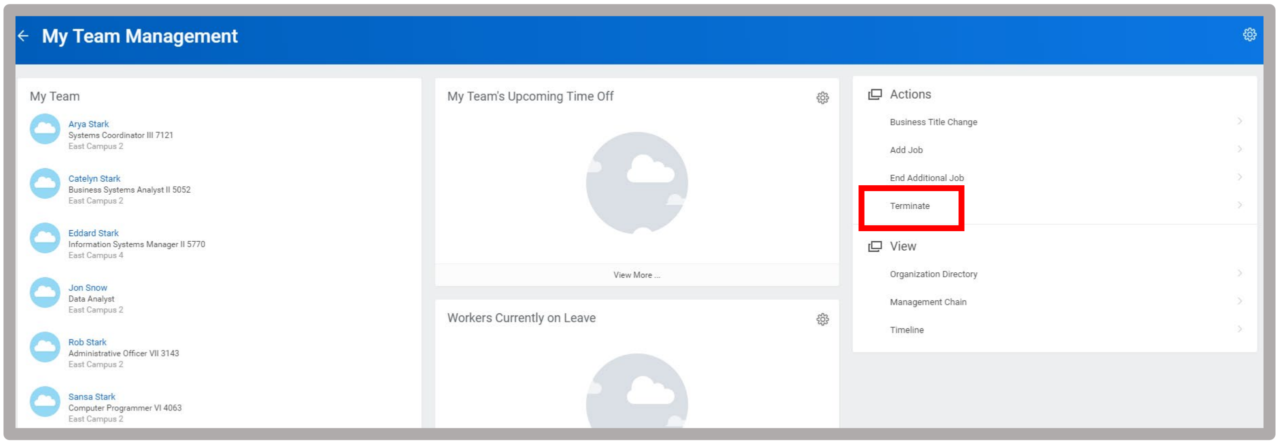
10. Click Submit to send for HR review.

## END EMPLOYEE CONTRACT/SUBMIT RESIGNATION OR RETIREMENT

1. On the Workday homepage, click **View All Apps** to go to the **My Team Management** application.

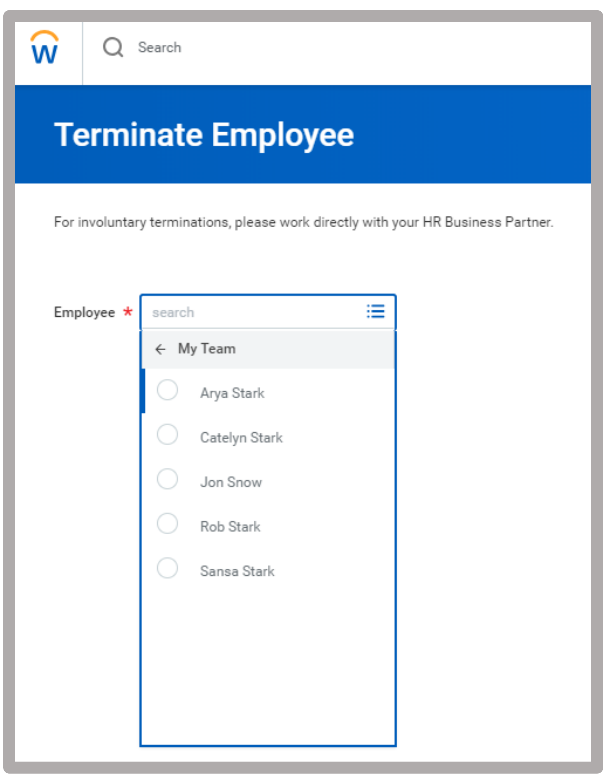


2. Select **Terminate** from the *Actions* menu.



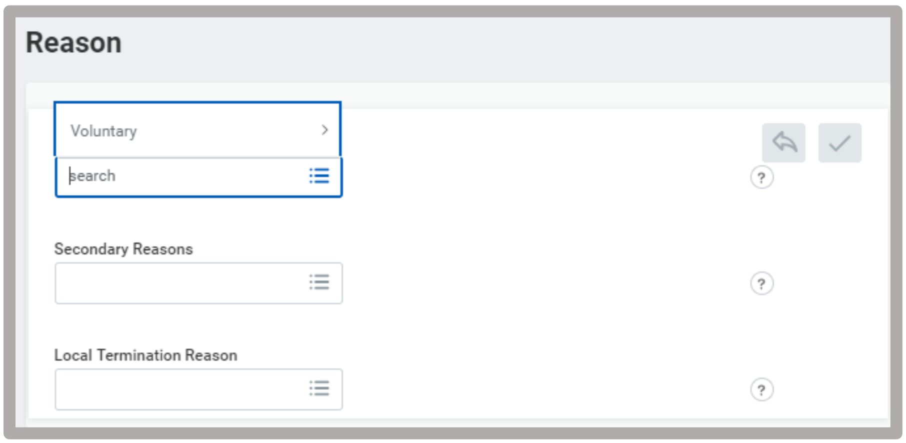

3. Select **My Team** and select appropriate employee.

   **Note:** *Terminate* is used to end an employee's only position in Workday (i.e. employee only has one job). *End Job* is used if the employee has multiple positions and you are ending one of the secondary ones (position will have a + symbol beside it if it is secondary). If the position ending is the primary job but the employee has additional jobs as well, please contact hrhelp@uwaterloo.ca for assistance.



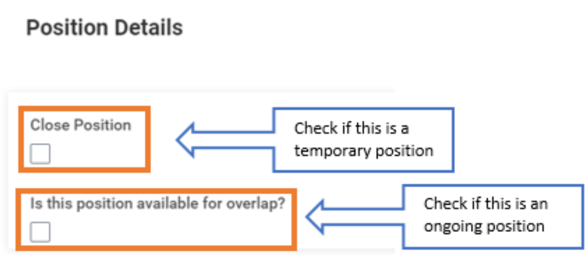
4. Click in the *Reason* section to activate the editable fields and click the prompt in the *Primary Reason* field to choose the appropriate resignation reason.

   **Tip:** Secondary and Local Termination Reasons may remain blank; or you may use the Secondary Reasons field to record further details, if applicable.




5. Enter the employee's last day worked as the *Termination Date*.

6. If terminating a temporary position, select the *Close Position* check box. If terminating a regular position, select the *Is this Position Available for Overlap* check box.




7. Scroll down to attach the resignation/retirement letter in the attachment field.
8. Click **Submit.**

# REPORTING

## TO ACCESS REPORTS AVAILABLE TO MANAGERS

There are **three ways** to access reports available to managers and timekeepers

1. Select **View All Apps** to access the **Manager Reports** application. Manager Reports

2. Search *Manager reports* in the main Workday search bar and select from the list of search results.
3. Type the report name in the main Workday search bar.

| ***Report name*** | ***Description*** | ***Access*** |
|---|---|---|
| ***UW CR Current Worker Detail Report*** | Current employee information, including:<br>• Employee ID<br>• Hire date<br>• Employee type<br>• Full or part-time<br>• Business title<br>• Location<br>• Supervisory organization<br>• Default cost center<br>• Manager<br>• Compensation amount<br>• Email address | Manager |
| ***UW CR Secondments and Temporary Assignments*** | Displays a list of employees reporting to you who are on a secondment or temporary reassignment and includes:<br>• Supervisory organization of the contract<br>• Business title of the contract<br>• Start and end dates | Manager |

| *Report name* | *Description* | *Access* |
|---|---|---|
| ***UW CR Compensation Spreadsheet*** | Compares all temporary and ongoing staff's USG levels and base salaries which includes:<br>• Most recent hire date<br>• Title<br>• Annual base compensation | Manager |
| ***UW CR Headcount & Open Position Analysis*** | Displays current headcount and open positions in a graph format. Can be drilled down to sort by:<br>• Job profile<br>• Position number<br>• Supervisory organization<br>• Time type<br>• Worker type | Manager |
| ***UW CR Emergency Contacts*** | Displays a list of employees and their emergency contact information | Manager |
| ***UW CR Employees with contracts*** | Displays a list of employees with end dates (i.e. casual employees, students, contract staff, etc.) and includes:<br>• Title<br>• Employee type<br>• Hire date<br>• End date | Manager |

| ***Report name*** | ***Description*** | ***Access*** |
|---|---|---|
| ***UW CR End date report*** | Displays a list of employees' end dates for the selected supervisory organizations and includes:<br>• Position number and title<br>• Indicates primary or secondary position<br>• Position hire date<br>• Position end employment date | Manager<br><br>Campus Partner |
| ***UW CR Workers with probation period ending*** | Displays a list of employees with upcoming probation end date and includes:<br>• Probation start dates<br>• Probation end date<br>• Extension date (if applicable)<br>• Length of probation | Manager |
| ***Onboarding Status Summary*** | Displays a list of employees and their progress level in the onboarding process | Manager |
| ***My Team's Learning Transcript*** | Displays your direct reports' learning history | Manager |
| ***UW CR Staff Vacation Balance Report*** | Displays vacation balances as of a selected period in the vacation year | Manager |
| ***UW CR Work from home details*** | Provides details on your employees' active work from home arrangements | Manager |

| ***Report name*** | ***Description*** | ***Access*** |
|---|---|---|
| ***Terminations*** | Displays voluntary and involuntary termination details for a selected period. | Manager |
| ***UW Reported Time Manager/Timekeeper*** | Displays a list of employees/a specific employee's submitted time and includes:<br>• Status (not submitted, submitted, approved, denied)<br>• Reported date (date worked)<br>• Hours<br>• Override rate<br>• Override cost center<br>• Comment | Manager<br><br>Timekeeper |
| ***UW CR Worker Info for Timekeeper*** | Displays employee titles and position IDs | Timekeeper |
| ***Time Entry Data for My Organization*** | Displays compensation information related to casual positions and includes:<br>• Employee ID<br>• Position ID<br>• Supervisory Organization<br>• Default hourly rate<br><br>Default cost center and costing allocations | Timekeeper<br><br>Manager |
| ***Time Entries for Manager Approval*** | Pulls time entry approval items from the Workday inbox and includes:<br>• Employee name<br>• Position ID<br>• Supervisory Organization<br>• Hourly rate (default or override, whichever applies)<br>• Cost center and costing allocations (default or override, whichever applies)<br>• Hours submitted<br>• Dates of hours worked<br>• Total amounts to be charged | Manager |

| *Report name* | *Description* | *Access* |
|---|---|---|
| ***Time Entries to Approve for My Cost Center*** | Pulls time entry approval items from the Workday inbox and includes:<br><br>• Employee name<br>• Position ID<br>• Supervisory Organization<br>• Hourly rate (default or override, whichever applies)<br>• Cost center and costing allocations)<br>• Hours submitted<br>• Dates of hours worked<br>• Total amounts to be charged | Cost Center Signing Authority |

## REPORTING TROUBLESHOOTING

**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, if appropriate.

### TIME ENTRY AND 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.

**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.

**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.

**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.

**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.

**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.

**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.

**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.