OKLAHOMA

Employee Lifecycle – Hire to Termination

THIS JOB AID IS FOR: Agency HR

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OKLAHOMA

CREATE POSITION

Purpose: To create a brand-new position within a supervisory organization.

Who can initiate: Central HR partner, HR executive, HR partner, HR specialist, manager, Shared Services.

Step 1: Initiation

Search **create position** in the search bar and select the corresponding task. Search for the correct supervisory organization by manager name or SOO- followed by manager's PIN. Fill out the required information, then select **Submit**.

Please note:

- The **Job Posting Title** is the business title that will appear under the employee's picture on their profile and what will appear on the job posting.
- **Number Of Positions** can be used to create multiple, identical positions. This defaults to "1."
- **Availability Date** is the date the position will be visible to the company. The **Earliest Hire Date** is the earliest the position can be filled. In Peoplesoft terms, this is the "effective date" of the position. Both dates may be the same.
- The **Job Profile** is the four-digit job code combined with the FLSA status (N or E) and the pay rate type (H or S). If there is not a job profile that matches the characteristics of the position you're creating, please contact OMES HCM.
- **Job Descriptions** will automatically populate for formerly classified positions (alphanumeric job codes). Headers with no subtext will populate for all others.
- The **Location of a Position** is the physical location of the office the employee is managed out of. It does not take into account travel or telework.
- Under **Worker Type**, a contingent worker is someone who will be in Workday for administrative reasons (like to approve time or access employee information) but won't be paid through Workday@OK. This includes contractors, consultants and GALT employees not paid on an agency's payroll. The job profile **Contractor** (E) should be chosen for all contingent workers as there is no pay plan associated with the profile.
- The **Worker Sub-Type** will change depending on what was chosen for worker type. If employee was chosen, options will include intern, regular, seasonal and temporary. If contingent worker was chosen, contractor and consultant will be available. The only impact the contingent worker sub-type has is on reporting, but the employee sub-type does affect other areas of the system.
- The **Available for Overlap** option allows for the position to be double filled. If left unchecked, this position will not be available to double fill. Best practice is to ensure this box is always checked.

Step 2: Review Position

A pop-up with **You have submitted** will appear and show what the next step is. If initiated by the HR specialist, the next step will be the **Change Organization Assignments** task. If initiated by someone other than the HR specialist, a **Review** step will be sent to the HR specialist. During the **Review** step, information may be changed as needed, then select **Submit**.

Step 3: Change Organization Assignments

The **Effective Date** of the change organization assignments task will default to the current date. This cannot be changed. This may require agencies who are completing this change after the event (hire/change job/add job) to manually make changes to org assignments during the event itself.
The **Company** will default to the agency the supervisory organization belongs to.
The **Cost Center** is what was formerly referred to as the "department" in Peoplesoft.
The **Costing** will generally be the agency's three-digit code, underscore, then 90000 (e.g., 090_90000).
The **Time Off Eligibility Override** is blank by default. Non-exempt positions will receive comp time at the time and a half rate for hours worked over 40. Exempt positions will receive comp time at the straight rate for hours worked over 40. Certain job codes (like 0020 – Temporary) and certain job families (like E60 – Elected Officials) are ineligible to receive leave. However, overrides can be applied in certain circumstances:

a. **Annual/Sick Leave Eligibility Override** – Used for employees who are eligible to receive annual and sick leave but are in an otherwise ineligible job classification, job family or job profile.
b. **Comp Core Eligibility** – Used for those who are eligible for the core eligibility.
c. **Comp Pub Eligibility** – Used for those who are eligible for public safety comp time.
d. **Education Leave/Education Leave – Extended** – Used for those who are eligible for and have requested to use education leave.
e. **Overtime** – Used for those who receive overtime payments instead of comp time.
f. **Shared Leave/Shared Leave (Terminal)** – Used for those who are eligible for and have requested to use shared leave.

It's important to note that these organizational assignments are assigned to the position, not the employee. If an employee on shared leave moves to a new position, the new position will need to be assigned the shared leave time off eligibility override. Select **Submit** when complete.

Step 4: Request Default Compensation Change

The **Effective Date** of the **Default Compensation Change Task** will default to the current date. This cannot be changed. This may require agencies who are completing this change after the event (hire/change job/add job) to manually make changes to compensation during the event itself. The guidelines will automatically populate according to the job profile selected. Nothing needs to be changed or added here.

A box for both **Salary** and **Hourly** will appear. Please only use the pay rate type indicated in the job profile. Do not use both boxes. Use the **Add** box to update the pay rate.

To assign an allowance plan, select the **Add** button in the **Allowance** box, choose **All Compensation Plans** in the menu, then choose the appropriate allowance plan. You can also type in the allowance plan if you know what you're looking for. Enter the amount or percentage in the appropriate box. Percentages will automatically calculate the amount.

Multiple allowance plans may be added. Allowance plans are optional and can be skipped if not applicable. Multiple allowances of the same type are not permitted, for example, you cannot have two **Skill Base Pay** (%) allowances.

In the final box, **Other**, ensure that all longevity-eligible positions are assigned the longevity pay plan. Select **Approve** when done.

Steps 5-14: Consolidated Approval Chain

For most agencies, the approval chain consists of:

a. The manager of the position.
b. The manager's manager.
c. HR partner.
d. Finance partner.
e. Agency assistant division director.
f. Agency division director.
g. Appointing authority.
h. Agency director.
i. HR partner again.
j. Central HR partner.

Additional approvers can be added during each step of the consolidated approval process. If cabinet secretary approval is required, the HR partner should assign them as an additional approver the second time they receive the approval.

Duplicate approval requests will not be sent if a previous approver is assigned to a subsequent role in the approval chain (i.e., if the finance partner is also the agency assistant division director, they will only receive one notification and after it will go to the agency division director). Roles that are blank will be skipped (i.e., if there's no appointing authority, it will go from the agency division director to the agency director). Shared Services agencies will have one approval go to the shared service group.

The **Approve** button sends the process forward. The **Send Back** button will send it back to a previous step. If there is a change that needs to be made, the process will need to be sent back to one of the first three steps (Revise, Change Org Assignments, or Request Default Compensation) and will need to go back through the approval chain. Select the menu icon in the **To** box to see all the steps the process can be sent back to. Provide a reason in the box below, then select **submit**.
To add additional approvers, select the **Add Approvers** button. Select the menu icon in the **Additional Approvers** box to see all approvers that can be added.
The button to the right of the **Add Approvers** button will give the option to either deny or cancel. **Deny** will end the process and sends a notification to the initiator and manager of the position that the process is no longer moving forward. **Cancel** backs the user out of the task. The task will still remain in the user's inbox.
Once approved by the agency approval chain, it will go to the Central HR Team (the Classification and Compensation team) for approval. Once approved by Central HR, the position number has been created. The new position number will start with the letter P and is followed by a six-digit number. The PIN can be found by selecting the details link from the notification.

Step 15: Assign Costing Allocation

The position is sent to the Finance partner to review costing allocations. Once the costing allocations have been assigned by the Finance partner and the task is submitted, the initiator and the manager will receive a notification that the task has been successfully completed.

Step 16: Update Special Use Fields

If the initiator is in the Department of Wildlife Conservation, an optional step will be sent to the HR specialist to edit additional data, which includes **Special Use Fields** and **Legacy Division Information**. This step can be skipped by selecting the gear icon in the top right corner and selecting **Skip This Task**.

EDIT POSITION RESTRICTIONS

Purpose: To change the details of an existing position before it is filled. This business process (BP) also sends the position through the approval process (formerly the 92 process). It is advisable that all positions go through the edit position restrictions process before the job is requisitioned and/or posted.
The correct job profile must be in place before the job requisition is complete, as it cannot be changed during the hire/change job/add job process. Edit position restrictions does not affect current incumbents; changes are applied to future hires or transfers into this position.

Who can initiate: Agency recruiter, HR executive, HR partner, HR specialist, specialist, Shared Services.

Step 1: Initiation

Search the position number in the search bar. Select the position → **Related Actions (…)** → **Position** Restrictions → **Edit Position** Restrictions. Change the required information as necessary, then select **Submit**.

Please note:

- The **Job Posting Title** is the business title that will appear under the employee's picture on their profile and what will appear on the job posting.
- **Availability Date** is the date the position will be visible to the company. In Peoplesoft terms, this is the "effective date" of the position. This will carry over from the position's creation event and should not be changed from the default. Note: This date cannot be changed once the position is filled.
- The **Earliest Hire Date** is the earliest the position can be filled. In Peoplesoft terms, this is the "effective date" of the position. If the position has never been filled and is vacant, set the date to match the availability date. If the position is vacant, but has been previously filled, the earliest possible date is the day after the final working day of the previous worker. If the position is filled, the date should be set to the earliest date this position will be filled.
- The **Job Profile** is the four-digit job code combined with the FLSA status (N or E) and the pay rate type (H or S). If there is not a job profile that matches the characteristics of the position you're editing, please contact OMES HCM.
- **Job Descriptions** will automatically populate for formerly classified positions (alphanumeric job codes). Headers with no subtext will populate for all others.
- The **Location** of a position is the physical location of the office the employee is managed out of. It does not take into account travel or telework.
- **Time Type** is whether the position is full-time or part-time.
- The **Worker Sub-Type** will change depending on what was chosen for worker type. If the position is an employee position, options will include intern, regular, seasonal and temporary. If the position is a contingent worker position, contractor and consultant will be available. The only impact the contingent worker sub-type has is on reporting. **You will be unable to switch a position from contingent worker to employee or vice-versa.**
- The **Available For Overlap** option allows for the position to be double filled. Best practice is to ensure this box is always checked.

Step 2: Review Position

A pop-up with **You have submitted** will appear and show what the next step is. If initiated by the HR specialist, the next step will be the **Change Organization Assignments** task. If initiated by someone other than the HR specialist, a **Review** step will be sent to the HR specialist. During the **Review** step, information may be changed as needed, then select **Submit**.

Step 3a: Change Organization Assignments

The **Effective Date** of the **Change Organization Assignments** task will default to the current date. This cannot be changed. This may require agencies who are completing this change after the event (hire/change job/add job) to manually make changes to org assignments during the event itself.
The **Company** will default to the agency the supervisory organization belongs to.
The **Cost Center** is what was formerly referred to as the “department” in Peoplesoft.
The **Costing** will generally be the agency’s three-digit code, underscore, then 90000 (i.e. 090_90000).
The **Time Off Eligibility Override** is blank by default. Non-exempt positions will receive comp time at the time and a half rate for hours worked over 40. Exempt positions will receive comp time at the straight rate for hours worked over 40. Certain job codes (like 0020 – Temporary) and certain job families (like E60 – Elected Officials) are ineligible to receive leave. Overrides can be applied in certain circumstances:

a. **Annual/Sick Leave Eligibility Override** – Used for employees who are eligible to receive annual and sick leave but are in an otherwise ineligible job classification, job family or job profile.
b. **Comp Core Eligibility** – Used for those who are eligible for the core eligibility.
c. **Comp Pub Eligibility** – Used for those who are eligible for public safety comp time.
d. **Education Leave/Education Leave – Extended** – Used for those who are eligible for and have requested to use education leave.
e. **Overtime** – Used for those who receive overtime payments instead of comp time.
f. **Shared Leave/Shared Leave (Terminal)** – Used for those who are eligible for and have requested to use shared leave.

It’s important to note that these organizational assignments are assigned to the position, not the employee. If an employee on shared leave moves to a new position, the new position will need to be assigned the shared leave time off eligibility override. Select submit when complete.

Step 3b: Edit Additional Data

An optional step will be sent to the HR specialist to edit additional data, which includes special use fields and legacy division information. This step can be skipped by selecting the gear icon in the top right corner and selecting **Skip This Task**.

Step 4: Request Default Compensation Change

The **Effective Date** of the **Default Compensation Change** task will default to the current date. This cannot be changed. This may require agencies who are completing this change after the event (hire/change job/add job) to manually make changes to compensation during the event itself.
The **Guidelines** will automatically populate according to the job profile selected. Nothing needs to be changed or added here.
A box for both **Salary** and **Hourly** will appear. Please only use the pay rate type indicated in the job profile. Do not use both boxes.
Select the **pencil icon** to update the **Pay Rate**. The rate can be changed one of three ways: by changing the **Amount** box to a target amount, by a dollar amount in the **Amount Change** box, or by a percentage in the **Percent Change** box. Changing one box will update the others.

Once complete, select the **check box** next in the top right. Selecting the back arrow will take you back without saving any changes. The new rate will appear under **Assignment Details** with the previous rate to the right of it. If the position is moving from one rate type to another, select the **X** box next to the **pencil icon** to remove the old rate, then select **Add** under the new rate. The old rate will show in the box with small red x's on the left side.
To assign an allowance plan, select **Add** in the **Allowance** box, choose **All Compensation Plans** in the menu, then choose the appropriate allowance plan. You can also input in the allowance plan if you know what you're looking for. Enter the amount or percentage in the appropriate box. Percentages will automatically calculate the amount.
Multiple allowance plans may be added. Allowance plans are optional and can be skipped if not applicable. Multiple allowances of the same type are not permitted, for example, you cannot have two **Skill Base Pay** (%) allowances.
In the final box, **Other**, ensure that all longevity-eligible positions are assigned the longevity pay plan. Select **Approve** when done.

Steps 5-14: Consolidated Approval Chain

For most agencies, the approval chain consists of:

a. The manager of the position.
b. The manager's manager.
c. HR partner.
d. Finance partner.
e. Agency assistant division director.
f. Agency division director.
g. Appointing authority.
h. Agency director.
i. HR partner again.
j. Central HR partner.

Additional approvers can be added during each step of the consolidated approval process. If cabinet secretary approval is required, the HR partner should assign them as an additional approver the second time they receive the approval.

Duplicate approval requests will not be sent if a previous approver is assigned to a subsequent role in the approval chain (i.e., if the finance partner is also the agency assistant division director, they will only receive one notification and after it will go to the agency division director).

Roles that are blank will be skipped (i.e., if there's no appointing authority, it will go from the agency division director to the agency director). Shared services agencies will have one approval go to the shared service group.

During the approval process, approvers will be able to compare the current information and the proposed changes to see what has changed.

The **Approve** button sends the process forward. The **Send Back** button will send it back to a previous step. If there is a change that needs to be made, the process will need to be sent back to one of the first three steps (Revise, Change Org Assignments, or Request Default Compensation) and will need to go back through the approval chain. Select the menu icon in the **To** box to see all the steps the process can be sent back to. Provide a reason in the box below, then select **Submit**. To add additional approvers, select **Add Approvers**. Select the menu icon in the **Additional Approvers** box to see all approvers that can be added.

The button to the right of the Add Approvers button will give the option to either **Deny** or **Cancel**.

Deny will end the process and sends a notification to the initiator and manager of the position that the process is no longer moving forward.

Cancel backs the user out of the task. The task will still remain in the user's inbox.

Once approved by the agency approval chain, it will go to the Central HR Team (the Classification and Compensation team) for approval. Once approved by Central HR, the initiator and the manager will receive a notification that the task has been successfully completed.

CHANGE DEFAULT COMPENSATION

Purpose: To change the compensation that defaults onto a position during the recruitment, hire or change job business process.

Who can initiate: HR executive, HR partner, HR specialist, Shared Services.

Step 1: Initiation

Search the position number in the search bar. Select the **related action icon (. . .)** from the position restrictions then, from the **Compensation** menu, select **Request Default Compensation Change**. Enter the **Effective Date** then select **OK**.

The **Guidelines** will automatically populate according to the job profile selected. Nothing needs to be changed or added here. If this section is blank, select the general compensation package in the **Compensation Package** box then select **Grade**. At the top of the menu, select **From Job Profile**, then choose what appears in the menu.

A box for both salary and hourly will appear. Please only use the pay rate type indicated in the job profile. Do not use both boxes. Select the **pencil icon** to update the pay rate. Once complete, select the **check box** next in the top right. Selecting the **back arrow** will take you back without saving any changes. The new rate will appear under assignment details with the previous rate to the right of it. If the position is moving from one rate type to another, Select the **X** box next to the pencil icon to remove the old rate, then select **Add** under the new rate. The old rate will show in the box with small red x's on the left side.

To assign an allowance plan, select **Add** in the **Allowance** box, choose **All Compensation Plans** in the menu, then choose the appropriate allowance plan. You can also type in the allowance plan if you know what you're looking for. Enter the amount or percentage in the appropriate box. Percentages will automatically calculate the amount.

Multiple allowance plans may be added. Allowance plans are optional and can be skipped if not applicable. Multiple allowances of the same type are not permitted; for example, you cannot have two **Skill Base Pay** (%) allowances.

In the final box, **Other**, ensure that all longevity-eligible positions are assigned the longevity pay plan. Select **Submit** when done.

HIRE

Purpose: To hire a new worker or rehire a terminated worker into Workday. With a couple of exceptions, most hires/rehires will go through recruitment (i.e., the applicant will apply to an open job, go through the recruitment process, then be sent to **ready to hire** by the recruiter). Exceptions include positions which are not posted through Workday@OK or are not required to be posted and for job-managed organizations.

Aside from the initiation step, the process will look the same regardless of how it's initiated except that **Change Org Assignments** and **Propose Compensation Hire** will not appear for hires/rehires routed through recruiting.

Who can initiate: HR executive, HR partner, HR specialist, specialist, recruiting administrator, Shared Services.

Step 1: Initiation

Initiated by recruiting: If a hire/rehire is initiated through the recruitment process, the HR specialist will receive a **Revise Employee Hire** step in their inbox. Under the **hire date** and **reason**, it will show the **job requisition number**.

Initiated manually – position-managed organizations: Job requisitions are <u>required</u> to hire into a position at all position-managed supervisory organizations. After creating the job requisition, take a **related action** (**. . .**) from the position and, from the **hire** menu, select **hire employee**.

Initiated manually – job-managed organizations: Job-managed organizations (those whose supervisory organizations have [JM] in the title) do not require job requisitions. There are no positions to hire into, so search for the supervisory organization, take a **related action** (. . .) from the supervisory organization, then from the **hire** menu, select **hire employee**.
On the hire initiation screen, there are two options: **hire an existing pre-hire** or **create a new pre-hire**. All workers need to have a pre-hire account to be hired into Workday@OK. If rehiring a terminated worker, search for the worker by name. Employee ID numbers cannot be used to find a worker. Active employees will not be available to hire. If no pre-hire exists, select **create a new pre-hire** to manually enter information on behalf of the employee.
If creating a new pre-hire, enter the required information, which includes the first name, last name and one piece of contact information. All other information is optional. Select **OK** when done.
Enter in the hire date and reason. **New hire** should be for employees who have never worked for the state before. **Rehire** should be used for those who have worked for the

state before (the rehire option kicks off the edit service dates BP and confirm/reinstate absence balances task). The rest of the information will pull over from the position.

Please Note: You will be unable to change the job profile from here. If it is incorrect, you will need to go back to **edit position restrictions** and amend it.

If the additional information is not displayed, select the arrow to the left of the title to display all information. Fill out all required information:

- **Job Title** – Auto-populates from the job profile; should be left as is.
- **Business Title** – Also known as the working title; this is what appears under the employee's name on the worker profile; auto-populates from the job profile; can be amended if needed.
- **Default Weekly Hours** – The standard number of hours worked at the agency; should always be 40.
- **Scheduled Weekly Hours** – The standard number of hours worked by this employee; affects FTE percentage.
- **Additional Job Classifications** – Adds additional classifications for individuals, like executive management excluded from civil service rules (HB1146/formerly cite code H005), other exempted employees from civil service rules (HB1146/formerly cite code H001), or those ineligible for longevity.
- **Workers' Compensation Code Override** – Assign a workers' comp code to the worker; formerly found on the MDC Job Data tab of Job Data in PeopleSoft.
- **First Day of Work** – The first day of work for the employee; should match and automatically pulls from the hire date.
- **Continuous Service Date** – Used to calculate the length of service; same as the benefits service date.
- **Benefits Service Date** – Used to calculate longevity payments.
- **Company Service Date** – The date the employee originally started with this agency.

Select **Submit** when complete.

Step 2: Change Organization Assignments

The effective date will auto-fill from the previous screen and cannot be edited. The information will automatically pull from the position. Make changes only as needed. The **Company** will default to the agency the supervisory organization belongs to. The **Cost Center** is what was formerly referred to as the "department" in Peoplesoft. The **Costing** will generally be the agency's three-digit code, underscore, then 90000 (e.g., 090_90000). The **Time Off Eligibility Override** is blank by default. Non-exempt positions will receive comp time at the time and a half rate for hours worked over 40. Exempt positions will receive comp time at the straight rate for hours worked over 40.

Certain job codes (like 0020 – Temporary) and certain job families (like E60 – Elected Officials) are ineligible to receive leave.

Overrides can be applied in certain circumstances:

a. **Annual/Sick Leave Eligibility Override** – Used for employees who are eligible to receive annual and sick leave but are in an otherwise ineligible job classification, job family or job profile.
b. **Comp Core Eligibility** – Used for those who are eligible for the core eligibility.
c. **Comp Pub Eligibility** – Used for those who are eligible for public safety comp time.
d. **Education Leave/Education Leave – Extended** – Used for those who are eligible for and have requested to use education leave.
e. **Overtime** – Used for those who receive overtime payments instead of comp time.
f. **Shared Leave/Shared Leave (Terminal)** – Used for those who are eligible for and have requested to use shared leave.

It's important to note that these organizational assignments are assigned to the position, not the employee. If an employee on shared leave moves to a new position, the new position will need to be assigned the **Shared Leave Time Off Eligibility Override**.

Step 3a: Assign Pay Group

Assign Pay Group will only kick off for employees who are eligible for no pay groups or multiple pay groups**.**
Select the appropriate pay group, then select **Submit**.

Step 3b: Propose Compensation Hire

This step will only be initiated if an employee did not receive an offer letter during the recruitment process.

The **Effective Date** and **Reason** will auto-populate from the hire details and cannot be edited. The information will automatically pull from the position. Make changes only as needed.

The **Total Base Pay** and **Guidelines** will automatically populate according to the job profile selected. If the compensation grade appears incorrect, you can choose the correct grade by selecting the menu icon in the **Grade** field, selecting **From Job Profile** at the top, then choosing the grade that appears.

A box for both salary and hourly will appear. Please only use the pay rate type indicated in the job profile. Do not use both boxes. Select the **pencil icon** to update the pay rate. Enter the amount, then select the check box next in the top right. The back arrow will take you back without saving any changes.

To assign an allowance plan, select the **Add** in the allowance box, **choose All Compensation Plans** in the menu, then choose the appropriate allowance plan. You may also type in the allowance plan if you know what you're looking for. Enter the amount or percentage in the appropriate box. Percentages will automatically calculate the amount. Multiple allowance plans may be added. Allowance plans are optional and can be skipped if not applicable. Multiple allowances of the same type are not permitted (for example, you cannot have two **Skill Base Pay** (%) allowances). In the final box, **Other**, ensure that all longevity-eligible positions are assigned the longevity pay plan. Select **Submit** when done.

Step 4: Review Employee Hire

A pop-up with **You have submitted** will appear and show what the next step is. If initiated by someone other than the HR specialist, a review step will be sent to the HR specialist. During the review step, information may be changed as needed, then select **Submit**.

Step 5-6: Consolidated Approval

A consolidated approval will go to the HR specialist then the Finance partner. If the HR specialist initiated the hire, it will go directly to the Finance partner. If the Finance partner initiated the hire, it will only go to the HR specialist. If the initiator is both a Finance partner and HR specialist, it will move to the next step.
There will be a message at the top of the screen to prompt finance partners to review costing allocations for the new hire's position. Select **Approve** to move forward, **Send Back** to have the HR specialist fix something, **Add Approvers** to add an additional reviewer, **Deny** to end the entire process and prevent it from moving forward (once denied this hire process cannot be recovered), or **Cancel** to stop viewing the task.

Please Note: After the consolidated approval by the HR specialist/Finance partner, the employee's ID number will be available on the worker profile. Search for the employee's name in the search bar and navigate to the worker profile. It will be available on the summary page on the right side of screen.

Step 7: Request One-Time Payment

An optional one-time payment step will appear in the HR specialist's inbox. It can be skipped by selecting the **gear icon** in the upper left corner and choosing **Skip This Task**.

Choosing **Deny** may cause the business process to stop and should not be used.

To add a one-time payment, select **Add** under **One-Time Payment**, select a one-time payment plan, then enter an amount or a percentage. Select **Submit** when complete.

Step 8: Remove Retiree Status

This optional step will only kick off if the new hire/rehire is a retiree in Workday@OK. If this applies, they will have the word Retiree at the end of their name in parentheses. It can be skipped by selecting the **gear icon** in the upper left corner and choosing **Skip This Task**. Enter the **Effective Date** (date of hire) and the **Reason** (Involuntary → Rehired), then select **Submit**.

Step 9: Onboarding Setup

This step can be completed by the HR specialist or the manager of the position. If completed by the manager, an approval step will go to the HR specialist. The onboarding setup is a way to communicate new hire information to both the new employee and to their team. There are three sections: the **Message**, **People to Meet**, and **Helpful Contacts**.

The **Message** is what the new employee will see on their onboarding dashboard. A generic message will be auto-populated here and can be changed as needed. This is a great place for agencies to put links to websites the employee may need to access for onboarding documents or give them vital information for their first few weeks of work. You can expand this box by selecting and dragging the bottom right corner of the box.

Please note, there is no formatting available for the message, including line breaks and hyperlinks.

The next section is the **People to Meet**. This section lists the people you'd like the new hire to meet and sends a notification to these people. The new hire will see these workers in a list on their onboarding dashboard. You can choose not to send a notification to the contacts by unchecking the **Notify** box. All the members of the manager's team will be automatically added, and a generic message is provided. You can add or remove people as needed and customize the generic message. You can expand this box by selecting and dragging the bottom right corner of the box. There is no formatting available for this box, including line breaks and hyperlinks.

The last section is **Helpful Contacts**. This section lists the people that the new employee should have contact information for and sends a notification to these people. The new hire will see these workers in a list on their onboarding dashboard. You can choose not to send a notification to the contacts by unchecking the **Notify** box. You can add people as needed and customize the generic message. You can expand this box by selecting and dragging the bottom right corner of the box. There is no formatting available for this box, including line breaks and hyperlinks. Select **Submit** when completed.

Step 10: Onboarding

When the new hire logs into Workday@OK for the first time, there are a couple of key areas they'll need to see:

1. The **notifications** and **inbox** icons will be available and have messages and tasks available to complete. Notifications are messages to the worker that don't contain tasks that others are waiting on. They can include suggested training or BP status notifications. The inbox contains actionable items. For new hires, this will include tasks like complete I-9, enroll in benefits and complete W-4s.
2. **Timely Suggestions** include any learning items that are coming due soon.
3. **Announcements** are messages created within Workday@OK and pushed to all workers' homepage. Currently, the only announcement prepared for SoO is the welcome announcement that links the worker to the onboarding dashboard. *This message is pending review by upper management.*

From the link in the announcements, new employees can access the onboarding dashboard. Here, they'll find some of the components set up during onboarding setup, such as the welcome message, People to Meet and helpful contacts, as well as the progress bar, which tracks how many tasks are ready, how many are completed, and a link to the inbox.

The employee will receive a total of 10 tasks in their inbox to complete the onboarding process. To get started, the employee can either use the link from the progress bar or use the inbox icon at the top of the screen to navigate to their new hire tasks.

The first three tasks to appear in the employee's inbox are **Edit Government IDs**, **Update Contact Information** and **Update Personal Information**.

In **Edit Government IDs**, the employee will add their social security or individual taxpayer identification number in the **National IDS** box at the top. The employee may enter additional government IDs in the box below, but this is not required.

Update Contact Information will contain information like home address, phone number and email address. Whatever was entered during the pre-hire creation or in the applicant portal will appear here. The employee should fill out all information. Multiple addresses, phone numbers and email addresses may be added. Select **Submit** when complete.

Update Personal Information will contain information like legal and preferred name, gender, DOB and race/ethnicity. The **Preferred Name** is what the employee would like to show on their worker profile and be called in the workplace. To change it, select the **pencil icon** next to **Preferred Name**, uncheck the **Use Legal Name as Preferred Name** and update the first name box. Select **Submit** when done.

After the first three tasks are complete, additional inbox items will become available. The progress bar on the onboarding dashboard will also be updated.
The first of the next set of tasks is **Complete Form I-9**. The information previously filled out by the employee will populate into the form. The employee will fill out the required information, then select **Submit**.

The next step**, Manage Payment Elections**, sets up the employee's direct deposit information. The routing number, bank name and account number are required, but employees can also add an account nickname, if desired. After the employee selects **Submit**, there will be a review step where the account and payment elections are displayed. Select **Submit** to continue.

A new task should have appeared in the inbox after the **Manage Payment Elections** task. Per Oklahoma state statute, employees are required to submit a blank, voided check or letter from their bank to set up their direct deposit. After the direct deposit information is set up, the employee will receive a task to upload a copy of their voided check or letter. Drag and drop a file or select one from the computer, check the **I Agree** box, then select **Submit**.
The **Change Benefit Elections** task enables the user to select their health, dental and vision insurance. Select **Let's Get Started** to begin. The employee will choose their benefit elections; add dependents if needed. Select **Submit**. The employee will review their choices, read the signature statement, select the box, select **Review** and sign.

The **Complete State and Local Withholding Elections** task is the state's W-4. The state information will default to the employee's state of residence, but can be changed, if needed. To begin, select **OK**. The top portion will default in from the worker profile. Fill the form out as needed, check the box for **I Agree**, then select **Submit**. Note: If the marital status is set to married, the total allowances will automatically be set to one. If the employee wants this to be zero, they can either check the box for **Allowance for Spouse** or change the marital status to **Married but withhold at the higher Single rate**.

The **Complete Federal Withholding Elections** task is the federal W-4. The top portion will default in from the worker profile. Fill the form out, check the box for **I Agree**, then select **Submit**.

The **Change Emergency Contacts** task allows the employee to store contact information for those they wish the agency to contact in case of an emergency. One contact is required but multiple can be added. The employee must enter at least one contact method, but they can fill out all if desired. Select **Submit** when complete.
Finally, employees are given the task of changing their photo. Drag and drop a photo or select one from the computer, resize/reposition the frame, then select **Submit**.

The new hire may notice that they have received a lot of notifications while completing onboarding. Notifications are sent to the employee when a task or BP has been successfully completed.

At this point in onboarding, all the tasks available for the worker have been completed, but there will be another task coming after the Central Benefits partners approve benefit elections.
There are three additional tasks after the core onboarding tasks have been completed by the new employee: **Review Payment Election**, **Review Benefit Change** and **Review Form I-9**.

1. The **Review Payment Election** displays the banking information submitted by the employee during onboarding. The HR specialist will need to navigate to the **Worker Profile**, go to the **Personal** tab, then look under documents to find and verify the worker's blank check or bank document. Once the document has been verified, navigate back to the task then select **Approve** or **Send Back**. **Deny** should NOT be used.
2. The **Review Benefit Change** step displays all benefit elections during the onboarding process for approval by the Benefits partner.
3. The **Review Form I-9** step enables the I-9 partner to review section one of the form (completed by the employee), complete section two, then submit the form to be sent to E-Verify. Workday@OK automatically sends the completed I-9 for to E-Verify and returns the status and E-Verify case number to Workday@OK. The status of an employee's E-Verify can be found by taking a **Related Action (. . .)** from the worker, finding **Personal Data** and selecting **View U.S. Employment Verification Status**.

The last step in the onboarding process, **Update My Talent Profile**, will be sent to the employee after Central Benefits has approved their benefit elections. Employees will be able to use the guided editor (which is a step-by-step editor) or go to a summary editor (in which all information is displayed on one screen).

- **Job History** – Employees can add their employment history here.
- **Education** – Employees can list all schools attended.
- **Work Experience** – Employees can list fields they have worked in; these correlate to the job family groups in Workday@OK.
- **Languages** – Employees can select from a prescribed list of languages and rate their ability.
- **Aspirations** – Employees can enter their career aspirations, including goals for their current role and interests in job profiles.

Finally, there is a summary page where the employee can review all the information previously entered. Select **Submit** to enter all the changes. A review is sent to the employee's manager where they can **Approve** or **Send Back**.

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Step 11: Retirement Eligibility

A retirement eligibility step will be sent to the HR partner. The HR partner will determine which retirement plan the employee is eligible for. List the status for each row, then select **Submit**.

Step 12: Request One-Time Payment for Referral By

An optional step for **One-Time Payment for Referral** will kick off only if there is a referral plan assigned to the job requisition and the new hire listed a referral during the recruitment process. It can be skipped by selecting the **gear icon** in the upper left corner and choosing **Skip This Task**. Enter the amount and select **Submit** when complete.

Step 13: Assign Work Schedule

Work schedules must be assigned to all workers. The schedule will be used in time tracking. Options include a standard Monday through Friday 40-hour week, 9/80 schedules and 4/10 schedules. Select **Submit** when done.

Please note: Work schedules may be changed after hire and may be updated and maintained by managers.

Step 14: Maintain Employee Contract

This optional step will only kick off if the new hire has a current employment contract on file. It can be skipped by selecting the **gear icon** in the upper left corner and choosing **Skip This Task**. If the current contract is closing, change the contract type to **Closed,** amend the contract end date to the hire date, then select **Submit**.

Step 15: Confirm or Reinstate Absence Balances for Rehire

This step will only kick off if the rehire reason is selected during the hire initiation.

Step 16: Edit Service Dates

This optional step enables HR specialists to review all employment dates, such as **Benefits Service Date**, **Time Off Service Date** and **Company Seniority Date**. It can be skipped by selecting the **gear icon** in the upper left corner and choosing **Skip This Task**. **Time Off Service Date** should be entered at this time for brand new hires. Failing to do so will create issues with annual leave accruals.

Step 17: Add Probation Period

This optional step enables HR specialists to add a trial period to the worker. It can be skipped by selecting the **gear icon** in the upper left corner and choosing **Skip This**

Task. Choose the type, enter either the **Trial Period End Date** *or* **Duration** (the following field is calculated based on the value of the chosen field), a probation review date and a note. The note in the probation review section is required.

CHANGE JOB

Purpose: To perform a transaction on a worker to change components of a worker's job or to transfer a worker from one agency to another. With a couple of exceptions, most job changes will go through recruitment (i.e., the applicant will apply to an open job, go through the recruitment process, then be sent to **change job** by the recruiter). Exceptions include positions which are not posted through Workday@OK or are not required to be posted and for job-managed organizations.

Additionally, **Change Job** can be initiated as a standalone process for cases like career progressions, full-time to/from part-time changes and FTE changes. Aside from the initiation step, the process will look the same regardless of how it's initiated except that **Change Org Assignments** and **Propose Compensation Change** will not appear for changes routed through recruiting.

Important: It is essential that the job profile is accurate on the position before beginning. **Edit Position Restrictions** should be completed for all positions prior to filling them. **Edit Position Restrictions** will also send users down the approval chain.

Please note: There are specific tasks for changing just a work location, a business title or who the position will be reporting to. To change a work location, take a related action off the worker and under **Job Change**, select **Change Location**. To change a business title, take a related action off the worker and under **Job Change**, select **Change Business Title**. To change who the position reports to, see the section in this job aid titled **Move Worker**.

Who can initiate: HR executive, HR partner, HR specialist, specialist, Shared Services.

Step 1: Initiation

Initiated by recruiting: During the offer stage, select **change job** to initiate the process. A **Revise Job Change** step will appear in the receiving agency's HR specialist's inbox and will include the job requisition number and effective date.
Initiated manually – position-managed organizations: Job requisitions are <u>required</u> to fill a position at all position-managed sup orgs. Job requisitions are not required for data changes made to the worker's existing position. After creating the job requisition, take a **Related Action (. . .)** from the worker and under **Job Change**, select **Transfer, Promote or Change Job.**

Initiated manually – job-managed organizations: Job-managed organizations (those whose sup orgs have [JM] in the title) do not require job requisitions. Take a **Related Action (. . .)** from the worker and under **Job Change**, select **Transfer, Promote or Change Job**.

Enter the effective date and select a reason that most appropriately reflects the situation. There are four choices that directly impact the steps the business process takes:

1. **Data Changes → Change Location** – uses an abbreviated version of the **Change Job** business process; please *only* use this reason if only the location is changing. Selecting this reason for other purposes may result in essential tasks not being run.
2. **Detail to Special Duty → Begin Special Duty** – includes an optional freeze position step, which allows agencies to freeze the employee's previous position.
3. **Promotion → Add New Manager Responsibilities** – creates a new supervisory organization; should *only* be used if a brand-new supervisory organization needs to be created (if the employee is promoting into a position which is already a supervisory organization, choose another option).
4. **Transfer → Transfer to New Agency** – moves the worker to a new agency.

Otherwise, there is no impact to the selection other than reporting.

Where it says, **Which team will this worker be on after this change**, enter the supervisory organization the new position is under. Once you choose the team, the manager's name in the box above will automatically update. Update location if needed, then select **Start** to begin.

On the **Move** tab, you will be asked what you would like to do with the opening left on the team. **I plan to backfill this headcount** will vacate the position the worker is in and allow it to be filled later. **Move this headcount to the new manager** will move both the worker and the position to the new manager. If this position may be double filled before the previous incumbent leaves, check the **Available for Overlap** box. If the employee is a manager, a box titled **Move Team** will appear. If the employee's team will be moving with them, select **Yes**. If the team will continue to report to the previous position, select **No**.

At the top of the **Job** tab, select **Position** and search for the employee's eight-digit PIN in the **Search** box. Do not check the box for **Do you want to create a new position**. The job profile will pull over from the position. **Please note**: The job profile cannot be changed at this time. If the job profile is incorrect, contact the OMES Service Desk for assistance. Change the business title at the bottom of the page if necessary.

On the **Location** tab, change the work location and scheduled weekly hours to change the FTE as needed.

On the **details** tab, you can add an additional job classification to note the 5% executive management outlined by the civil service rules. This is where you can also change the employee type, time type and workers' comp code. The default weekly hours must always be left as 40.

On the **Attachments** tab, you can add any documents as needed. Documents will be stored on the worker's profile.

On the **Organizations** tab, the information will populate from the position. The **Company** will default to the agency the supervisory organization belongs to. The **Cost Center** is what was formerly referred to as the "department" in Peoplesoft. The **Costing** will generally be the agency's three-digit code, underscore, then 90000 (i.e., 090_90000). The **Time Off Eligibility Override** is blank by default. Non-exempt positions will receive comp time at the time and a half rate for hours worked over 40. Exempt positions will receive comp time at the straight rate for hours worked over 40. Certain job codes (like 0020 – Temporary) and certain job families (like E60 – Elected Officials) are ineligible to receive leave. Overrides can be applied in certain circumstances:

a. **Annual/Sick Leave Eligibility Override** – Used for employees who are eligible to receive annual and sick leave but are in an otherwise ineligible job classification, job family or job profile.
b. **Comp Core Eligibility** – Used for those who are eligible for the core eligibility.
c. **Comp Pub Eligibility** – Used for those who are eligible for public safety comp time.
d. **Education Leave/Education Leave – Extended** – Used for those who are eligible for and have requested to use education leave.
e. **Overtime** – Used for those who receive overtime payments instead of comp time.
f. **Shared Leave/Shared Leave (Terminal)** – Used for those who are eligible for and have requested to use shared leave.

It's important to note that these organizational assignments are assigned to the position, not the employee. If an employee on shared leave moves to a new position, the new position will need to be assigned the shared leave time off eligibility override.

On the **Compensation** tab, the information will automatically pull from the position. Make changes only as needed. Add an employee visibility date if you do not want the employee to see the transaction until a certain date. This is optional and can be skipped. The guidelines will automatically populate according to the job profile the worker is currently assigned to. Nothing needs to be changed or added here.

A box for both salary and hourly rates will appear. Please only use the pay rate type indicated in the job profile; do not use both boxes. Use the **pencil icon** to update the pay rate. You can use **Amount** to enter the new salary or hourly amount for the worker, **Amount Change** to change the amount by a dollar amount, or **Percent Change** to change the amount by a percentage. Changing one changes the others. Please only pick one box to amend.

To assign an allowance plan, select **Add** in the **Allowance** box, choose **All Compensation Plans** in the menu, then choose the appropriate allowance plan. You can also type in the allowance plan if you know what you're looking for. Enter the amount or percentage in the appropriate box. Percentages will automatically calculate the amount. To amend an existing allowance, select the **pencil icon** and make changes as needed. To remove an existing allowance, select the **X** next to the **pencil icon**.

Multiple allowance plans may be added. Allowance plans are optional and can be skipped if not applicable. Multiple allowances of the same type are not permitted (for example, you cannot have two **Skill Base Pay** (%) allowances).

In the final box, **Other**, ensure that all longevity-eligible positions are assigned the longevity pay plan. Select **Submit** when done.

Once you get to the summary page, review, then select **Submit**.

Step 2: Review Prior HR Specialist

This step will only be initiated if the employee is transferring to another agency.

The employee's previous HR specialist will receive a task to review the transfer information. The HR specialist will be able to amend the effective date if needed. Please note that no changes should be made to the transfer without consulting with the receiving agency. Once reviewed, select **Approve** at the bottom of the page.

Step 3: Review Change Job

A pop-up with **You have submitted** will appear and show what the next step is. A review step will be sent to the receiving agency's HR specialist. During the review step, information may be changed as needed, then select **Approve**.

Step 4: Change Organization Assignments

This step will only be initiated if an employee did not receive an offer letter during the recruitment process.

The **Effective Date** will auto-fill from the previous screen and cannot be edited. The information automatically pulls from the position. Make changes only as needed.

The **Company** will default to the agency the supervisory organization belongs to. The **Cost Center** is what was formerly referred to as the "department" in Peoplesoft. The **Costing** will generally be the agency's three-digit code, underscore, then 90000 (i.e., 090_90000). The **Time Off Eligibility Override** is blank by default. Non-exempt positions will receive comp time at the time and a half rate for hours worked over 40. Exempt positions will receive comp time at the straight rate for hours worked over 40. Certain job codes (like 0020 – Temporary) and certain job families (like E60 – Elected Officials) are ineligible to receive leave. Overrides can be applied in certain circumstances:

a. **Annual/Sick Leave Eligibility Override** – Used for employees who are eligible to receive annual and sick leave but are in an otherwise ineligible job classification, job family, or job profile.
b. **Comp Core Eligibility** – Used for those who are eligible for the core eligibility.
c. **Comp Pub Eligibility** – Used for those who are eligible for public safety comp time.
d. **Education Leave/Education Leave – Extended** – Used for those who are eligible for and have requested to use education leave.
e. **Overtime** – Used for those who receive overtime payments instead of comp time.
f. **Shared Leave/Shared Leave (Terminal)** – Used for those who are eligible for and have requested to use shared leave.

It's important to note that these organizational assignments are assigned to the position, not the employee. If an employee on shared leave moves to a new position, the new position will need to be assigned the shared leave time off eligibility override.

Step 5a: Assign Pay Group

Assign pay group will only kick off for employees who are eligible for no pay groups or multiple pay groups.

Select the appropriate pay group, then select **Submit**.

Step 5b: Propose Compensation Change

This step will only be initiated if an employee did not receive an offer letter during the recruitment process.

The **Effective Date** and **Reason** will auto-populate from the job change details and cannot be edited. The information will automatically pull from the position. Make changes only as needed.

The **Total Base Pay** and **Guidelines** will automatically populate according to the job profile selected. If the compensation grade appears incorrect, you can choose the correct grade by selecting the **menu icon** in the **Grade** field, selecting **From Job Profile** at the top, then choosing the grade that appears.

A box for both salary and hourly will appear. Please only use the pay rate type indicated in the job profile. Do not use both boxes. Select the **pencil icon** to update the pay rate. Enter the amount, then select the **check box** next in the top right. Selecting the **back arrow** will take you back without saving any changes.

To assign an allowance plan, select **Add** in the **Allowance** box, choose **All Compensation Plans** in the menu, then choose the appropriate allowance plan. You can also type in the allowance plan if you know what you're looking for. Enter the amount or percentage in the appropriate box. Percentages will automatically calculate the amount. Multiple allowance plans may be added. Allowance plans are optional and can be skipped if not applicable. Multiple allowances of the same type are not permitted (for example, you cannot have two **Skill Base Pay** (%) allowances). In the final box, **Other**, ensure that all longevity-eligible positions are assigned the longevity pay plan. Select **Submit** when done.

Step 6-7: Consolidated Approvals

A consolidated approval will go to the HR specialist then the Finance partner. If the HR specialist initiated the job change, it will go directly to the Finance partner. If the Finance partner initiated the job change, it will only go to the HR specialist. If the initiator is both a Finance partner and HR specialist, it will move to the next step.

There will be a message at the top of the screen to prompt finance partners to review costing allocations for the employee's position. Select **Approve** to move forward, **Send Back** to have the HR specialist fix something, **Add Approvers** to add an additional reviewer, **Deny** to cancel the entire process or **Cancel** to stop viewing the task.

Step 8: Manage Business Processes for Worker

This step will go to the (previous, if transferring agencies) agency's HR partner. There are three tabs to work through:

- **Inbox items assigned to worker** – if there is something in the worker's inbox, it will appear here. The business process, how many people the task is assigned to, and the subject are all included on this tab. Choosing **Cancel** in the action box will cancel the business process. Choosing **Reassign** will enable the HR partner to choose another worker to send the task to. Leaving it blank will leave it in the employee's inbox.

- **Business processes about the worker** – if there are any active business processes for the worker, they will appear here. This includes the change job currently in flight. Review each process and only check the box to cancel items that you are certain no longer apply to the worker.
- **Delegations to the worker** – if the worker has been assigned any delegations by other users, they will appear here.

Select **Submit** when complete.

Step 9a: Create Manual Accrual Adjustments for Period Prior to Agency Transfer

This step will only be initiated if the employee is transferring to a new agency. This will make sure the employee has the appropriate accrued balances.

A to-do step (or reminder) will appear in the previous agency's Absence partner's inbox. Select the orange box below the instructions to maintain accruals and time off adjustments/overrides. Once complete, return to the inbox and select **Submit**.

Step 9b: Create Payouts for Time Off Plans

This step will only be initiated if the employee is transferring to a new agency. This will be entered on the timesheet for the employee.

A to-do step (or reminder) will appear in the previous agency's Absence partner's inbox. Select the orange box below the instructions to enter time for the worker and create payouts for time off plans. Once complete, return to the inbox and select **Submit**.

Step 9c: Freeze Worker's Previous Position

This step will only be initiated if the employee is being detailed to special duty and their PIN changes.

A to-do step will appear in the HR partner's inbox to freeze the worker's previous position. To freeze the position, follow the link in the orange box to manage position freeze. Enter the employee's previous position then select **OK**. Select a **Reason**, **Effective Date**, then check the **Frozen** box to freeze a position. If already frozen, uncheck the box to unfreeze. Select **Submit** when complete. To continue without freezing the previous position or once the freeze has been complete, return to the inbox and select **Submit**.

A position's freeze status can be found on the **Position Overview** tab of the position restrictions (labeled **Hiring Freeze**).

Step 10a: Review User-Based Security Groups Assignments

This step will only be initiated if the employee has user-based security groups and their PIN changes.

A to-do step (or reminder) will appear in the receiving agency's Security partner's inbox. Navigate to worker's role assignments and review user-based security groups as needed. Once complete, return to the inbox and select **Submit**.

Step 10b: Assign Roles – Change Assignments for Worker

This step will only be initiated if the employee has role-based security groups and their PIN changes.

A to-do step (or reminder) will appear in the receiving agency's Security partner's inbox. Several options will be available:

- **Transfer role assignments from old position to new position** – Moves the previous role assignments to the new position and removes them from the old position.
- **Copy role assignments from old position to new position** – Makes a copy of the role assignments from the old position and applies it to the new position.
- **Copy role assignments to new position from** – Makes a copy of role assignments from a designated position and applies it to the new position.
- **Remove role assignments from old position** – Removes the role assignments from the old position and does not assign any roles to the new position.
- **None of the above** – Opens a new menu.

Selecting **None of The Above** opens a list of all the role-based security roles assigned to the worker. Add or remove assignees as needed, then select **Submit**. To leave all security roles as is, choose **None of The Above** then select **Submit** without adding or removing assignees.

Important: If the worker is transferring to your agency, please do not remove any security roles. This will remove roles from the position at the employee's former agency.

Step 10c: Request One-Time Payment

An optional one-time payment step will appear in the HR specialist's inbox. It can be skipped by selecting the **gear icon** in the upper left corner and choosing **Skip This Task**.

Choosing **Deny** may cause the business process to stop and should not be used.

To add a one-time payment, select **Add** under **One-Time Payment**, select a one-time payment plan, then enter an amount or a percentage. Select **Submit** when complete.

Step 11a: Maintain Employee Contract

This step will only be initiated if the employee has an existing open contract.

Change the status of the existing contract to closed and set the **Contract End Date** to one day before the **Change Job Effective Date**. The **Contract Review Date** can be set to the **Contract End Date**. Select **Submit** when complete.

Step 11b: Maintain Time Off Plan Transfer Balance

This step will only be initiated if the employee is transferring to a new agency. This will allow the new agency to confirm the new plan balances for sick and monthly are correct when the employee's pay frequency is changing.

Step 11c: Update Time Off Requests

This step will only be initiated if the employee has an open time off request. This will allow upcoming time off requests to be accepted, updated or removed if applicable.

Step 11d: Absence Accrual Eligibility

This step will only be initiated if the employee is transferring to a new agency.

Step 12: Onboarding Setup

This step will only be initiated if the employee is transferring to a new agency.

This step can be completed by the HR specialist or the manager of the position. If completed by the manager, an approval step will go to the HR specialist. The onboarding setup is a way to communicate new hire information to both the new employee and to their team. There are three sections: **Message**, **People to Meet** and **Helpful Contacts**.

The **Message** is what the employee will see on their onboarding dashboard. A generic message will be auto-populated here and can be changed as needed. This is a great place for agencies to put links to websites the employee may need to access for onboarding documents or give them vital information for their first few weeks of work. You can expand this box by selecting and dragging the bottom right corner of the box. There is no formatting available for this box.

The next section is the **People to Meet**. This section lists the people you'd like the new hire to meet and sends a notification to these people. The new hire will see these workers in a list on their onboarding dashboard. You can choose not to send a notification to the contacts by unchecking the **Notify** box. All the members of the manager's team will be automatically added and a generic message is provided. You can add or remove people as needed and customize the generic message. You can expand this box by selecting and dragging the bottom right corner of the box. There is no formatting available for this box, including no line breaks and hyperlinks.

The last section is **Helpful Contacts**. This section lists the people that the new employee should have contact information for and sends a notification to these people. The new hire will see these workers in a list on their onboarding dashboard. You can choose not to send a notification to the contacts by unchecking the **Notify** box. You can add people as needed and customize the generic message. You can expand this box by clicking and dragging the bottom right corner of the box. There is no formatting available for this box (which includes line breaks and hyperlinks). Select **Submit** when completed.

Step 13a: Onboarding

- **If transferring between agencies** - Talent Review
- **If work location is changing**:
    - Federal Withholding Elections
    - State and Local Withholding Elections
    - Benefit Elections

Step 13b: Maintain Employee Contract

This step will only be initiated if the employee is entering a position that requires contract.

Enter the **Contract Start Date**, choose the **Contract Type**, set the status to **Open** then choose a **Contract End Date**. Tabbing out of the **Contract End Date** will bring up a **Contract Review** section. Select the **Contract Review Date**, then select **Submit**. A **Generate Document** step will be issued to the HR specialist, where the details of the contract should be reviewed and amended as needed. It will be sent to the HR executive or appointing authority and the employee to be signed digitally. The document is then stored on the worker profile.

Step 14a: Create Subordinate

If the **Add New Manager Responsibilities** reason was selected during the initiation step, at this point, HCM would receive the task to create the new subordinate organization.

Step 14b: Change Superior Organization

If the employee is a manager and **Move Manager’s Team** is selected, at this point, HCM would receive the task to change the team’s superior organization.

Step 14c: Current Retirement Elections

This step will only be initiated if the employee is transferring to a new agency *or* if the employee is moving to/from seasonal *or* if the employee is moving to/from National Guard.

A report with the employee's current retirement elections will be sent to the new HR partner. The new HR partner will advise employee of any possible options they have in accordance with the rules of the retirement plan they are enrolled in.

Step 15a: Verify Retirement Plan

This step will only be initiated if the employee is transferring to a new agency *or* if the employee is moving to/from seasonal *or* if the employee is moving to/from National Guard.

Verify the retirement status for each row, then select **Submit**.

Step 15b: Review Probation Period

This step will only be initiated if the employee is transferring to a new agency and the employee has a trial period that ends after the effective date of the transfer.

In the review step, choose a probation outcome and an action. The following options include:

- **End of Probation** – Choosing this option will end the probation period for the employee. Under action, **Change Job for Review Probation Period** will kick off the change job business process (useful for career progressions after successful completion of a trial period) and **No Action Needed** will end the trial period on its scheduled date.
- **Extend Probation Period** – Choosing this option will enable the HR specialist to extend the current trial period.
- **Separation** – Choosing this option kicks off the termination process for the worker.
- **Trial Period – Return to Previous Position** – Choosing this option kicks off **Change Job for Review Probation Period**, which would enable agencies to send workers back to their previous position.

Select **Submit** when complete.

Step 16: Review Worker's Company Seniority Date
This step will only be initiated if the employee is transferring to a new agency.

A to-do step will remind the HR specialist to review the employee's company seniority date. Edit a worker's services dates as needed, then return to the inbox and select **Submit**.

ADD JOB
Purpose: To add an additional job to an employee's worker profile. Add job should be used when an employee is working under multiple PINs and takes the place of adding an employment instance in PeopleSoft.

Who can initiate: HR executive, HR partner, HR specialist, specialist, Shared Services.

Step 1: Initiation
Initiated by recruiting: If a hire/rehire is initiated through the recruitment process, the HR specialist will receive a **Revise Employee Hire** step in their inbox. Under the **Hire Date** and **Reason**, it will show the job requisition number.

Initiated manually – position-managed organizations: Job requisitions are <u>required</u> to hire into a position at all position-managed supervisory organizations. After creating the job requisition, select the **related action icon** next to the worker and from the **Job Change** menu select **Add Job.**

Initiated manually – job-managed organizations: Job-managed organizations (those whose supervisory organizations have [JM] in the title) do not require job requisitions. There are no positions to hire into, so search for the supervisory organization, select the **related action icon** next to the worker and from the **Job Change** menu select **Add Job**.

Enter in the **Effective Date**, **Reason** and **Position**. The rest of the information will pull over from the position.

Please note: You will be <u>unable</u> to change the job profile from here. If it is incorrect, you will need to go back to edit position restrictions and amend it.

Amend the scheduled weekly hours if needed.

If the additional details are not displayed, select the small **arrow** to the left of the title to display all information. Fill out all required information:

- **Job Title** – Auto-populates from the job profile; should be left as is.
- **Business Title** – Also known as the working title; this is what appears under the employee's name on the worker profile; auto-populates from the job profile; can be amended if needed.
- **Default Weekly Hours** – The standard number of hours worked at the agency; should always be 40.
- **Additional Job Classifications** – Adds additional classifications for individuals, like executive management excluded from civil service rules (HB 1146/formerly cite code H005), other exempted employees from civil service rules (HB 1146/formerly cite code H001), or those ineligible for longevity.
- **Workers' Compensation Code Override** – Assign a workers' comp code to the worker; formerly found on the MDC Job Data tab of Job Data in PeopleSoft.
- **First Day of Work** – The first day of work for the employee; should match and automatically pulls from the effective date.

Select **Submit** when complete.

Step 2: Review Add Additional Job

A pop-up with **You have submitted** will appear and show what the next step is. If initiated by someone other than the HR specialist, a review step will be sent to the HR specialist. During the review step information may be changed as needed, then select **Submit**.

Step 3: Propose Compensation Hire

This step will only be initiated if an employee did not receive an offer letter during the recruitment process.

The **Effective Date** and **Reason** will auto-populate from the hire details and cannot be edited. The information will automatically pull from the position. Make changes only as needed.

The **Total Base Pay** and **Guidelines** will automatically populate according to the job profile selected. If the compensation grade appears incorrect, you can choose the correct grade by selecting the **menu icon** in the **Grade** field, selecting **From Job Profile** at the top, then choosing the grade that appears.

A box for both salary and hourly will appear. Please only use the pay rate type indicated in the job profile. Do not use both boxes. Select the **pencil icon** to update the pay rate. Enter the amount, then select the **check box** next in the top right. Selecting the **back arrow** will take you back without saving any changes.

To assign an allowance plan, select **Add** in the **Allowance** box, choose **All Compensation Plans** in the menu, then choose the appropriate allowance plan. You can also type in the allowance plan if you know what you're looking for. Enter the amount or percentage in the appropriate box. Percentages will automatically calculate the amount. Multiple allowance plans may be added. Allowance plans are optional and can be skipped if not applicable. Multiple allowances of the same type are not permitted; for example, you cannot have two **Skill Base Pay** (%) allowances. In the final box, **Other**, ensure that all longevity-eligible positions are assigned the longevity pay plan. Select **Submit** when done.

Step 4: Change Organization Assignments

This step will only be initiated if an employee did not receive an offer letter during the recruitment process.

The **Effective Date** will auto-fill from the previous screen and cannot be edited. The information automatically pulls from the position. Make changes only as needed.

The **Company** will default to the agency the supervisory organization belongs to. The **Cost Center** is what was formerly referred to as the "department" in Peoplesoft. The **Costing** will generally be the agency's three-digit code, underscore, then 90000 (e.g., 090_90000). **The Time Off Eligibility Override** is blank by default. Non-exempt positions will receive comp time at the time and a half rate for hours worked over 40. Exempt positions will receive comp time at the straight rate for hours worked over 40. Certain job codes (like 0020 – Temporary) and certain job families (like E60 – Elected Officials) are ineligible to receive leave. Overrides can be applied in certain circumstances:

a. **Annual/Sick Leave Eligibility Override** – Used for employees who are eligible to receive annual and sick leave but are in an otherwise ineligible job classification, job family or job profile.
b. **Comp Core Eligibility** – Used for those who are eligible for the core eligibility.
c. **Comp Pub Eligibility** – Used for those who are eligible for public safety comp time.
d. **Education Leave/Education Leave – Extended** – Used for those who are eligible for and have requested to use education leave.
e. **Overtime** – Used for those who receive overtime payments instead of comp time.
f. **Shared Leave/Shared Leave (Terminal)** – Used for those who are eligible for and have requested to use shared leave.

It's important to note that these organizational assignments are assigned to the position, not the employee. If an employee on shared leave moves to a new position, the new position will need to be assigned the **Shared Leave Time Off Eligibility Override**.

Step 5: Assign Pay Group
Assign pay group will only kick off for employees who are eligible for no pay groups or multiple pay groups.

Select the appropriate pay group, then select **Submit**.

Step 6-7: Consolidated Approval
A consolidated approval will go to the HR specialist then the Finance partner. If the HR specialist initiated the hire, it will go directly to the Finance partner. If the Finance partner initiated the hire, it will only go to the HR specialist. If the initiator is both a Finance partner and HR specialist, it will move to the next step.

There will be a message at the top of the screen to prompt finance partners to review costing allocations for the new hire's position. Select **Approve** to move forward, **Send Back** to have the HR specialist fix something, **Add Approvers** to add an additional reviewer, **Deny** to end and close the entire process or **Cancel** to stop viewing the task.

Please Note: After the consolidated approval by the HR specialist/Finance partner, the employee's ID number will be available on the worker profile. Search for the employee's name in the search bar and navigate to the worker profile. It will be available on the summary page on the right side of screen.

Step 8: Switch Primary Job
An optional step to switch the employee's primary job will appear in the HR specialist's inbox. It can be skipped by selecting the **gear icon** in the upper left corner and choosing **Skip This Task**. Select a **Reason** then select **Submit**. A review step will appear in the HR specialist's inbox to review the switch.

Step 9: Onboarding Setup
This step can be completed by the HR specialist or the manager of the position. If completed by the manager, an approval step will go to the HR specialist. The onboarding setup is a way to communicate new hire information to both the new employee and to their team. There are three sections: **Message**, **People to Meet** and **Helpful Contacts**.

The **Message** is what the new employee will see on their onboarding dashboard. A generic message will be auto-populated here and can be changed as needed. This is a great place for agencies to put links to websites the employee may need to access for onboarding documents or give them vital information for their first few weeks of work. You can expand this box by selecting and dragging the bottom right corner of the box. There is no formatting available for this box.

The next section is the **People to Meet**. This section lists the people you'd like the new hire to meet and sends a notification to these people. The new hire will see these workers in a list on their onboarding dashboard. You can choose not to send a notification to the contacts by unchecking the **Notify** box. All the members of the manager's team will be automatically added, and a generic message is provided. You can add or remove people as needed and customize the generic message. You can expand this box by selecting and dragging the bottom right corner of the box. There is no formatting available for this box, including line breaks and hyperlinks.

The last section is **Helpful Contacts**. This section lists the people that the new employee should have contact information for and sends a notification to these people. The new hire will see these workers in a list on their onboarding dashboard. You can choose not to send a notification to the contacts by unchecking the **Notify** box. You can add people as needed and customize the generic message. You can expand this box by selecting and dragging the bottom right corner of the box. There is no formatting available for this box, including line breaks and hyperlinks. Select **Submit** when completed.

Step 10: Onboarding

- **If transferring between agencies** - Talent Review
- **If work location is changing**:
  - Federal Withholding Elections
  - State and Local Withholding Elections

RETIRE/TERMINATE

Purpose: To terminate or retire an employee.

Who can initiate: HR executive, HR partner, HR specialist, specialist, Shared Services.

Step 1: Initiation

Search for the employee in the search bar. Under **Job Change**, choose **Terminate Employee**. Enter in a **Reason** and an optional second reason. In the **Termination Date**, <u>enter the last day the employee is on payroll</u> (not the day after, like in PeopleSoft). The last day of work and pay through date will auto-populate from the termination date. Enter a **Resignation Date** if one was provided. The **Regrettable** box can be used to indicate regrettable terminations and is optional. If the position is available for **Overlap**, ensure the check box under position details is checked. Select **Submit** when complete.

Step 2a: Review Employee Termination

A pop-up with **You have submitted** will appear and show what the next step is. A review step will be sent to the receiving agency's HR specialist. During the review step, information may be changed as needed, then select **Approve**.

Step 2b: Assign Roles – Change Assignments for Worker

This step will only be initiated if the employee has role-based security groups.

A step to reassign roles for the terminated worker will appear in the Security partner's inbox. There are three options:

- **Transfer the role assignments to another position.**
- **Remove all role assignments**.
- **None of the above.**

Selecting **None of the above** opens a list of all the role-based security roles assigned to the worker. Add or remove assignees as needed, then select **Submit**. To leave all security roles as is, choose **None of the above** then select **Submit** without adding or removing assignees.

Step 3: Deactivate Worker Payment Elections

This step automatically completes.

Step 4: Populate Date of Death

This step will only be initiated if the termination reason is death.

A to-do step will appear to remind the HR specialist to enter the **Date of Death** for the worker. Select the orange box labeled **Edit Personal Information** to add the date of death. Once entered, return to the inbox, and select **Submit**.

Step 5: Confirm Timesheet, Accrual Calculations and Absence Balances (Prior to Payouts)

A to-do step will appear in the Absence partner's inbox to update the worker's timesheet, accrual calculations and absence balances. Once updated, return to the inbox and select **Submit**.

Step 6a: Adjust Time Off Balances

This step automatically completes.

Step 6b: Create Payouts for Time Off Plans

A to-do step will appear in the Absence partner's inbox to update **Create Payouts for Annual Leave**, **Compensatory Plans** and **Sick Buy Out if applicable**. Once updated, return to the inbox and select **Submit**.

Step 7: Automated Leave Processing
This step automatically completes.

Step 8: Add Retiree Status
This step will only be initiated if the termination reason is retirement.

Enter the **Effective Date** (which should be the first day of retirement), **Reason** and **Retiree Organization**. Select **Submit** when done.

Step 9a: End Payroll Inputs
This step will be completed by the Payroll partner.

Step 9b: Deactivate Worker Payment Elections
This step automatically completes 60 days after the termination effective date.

Step 9c: Complete Pay Inputs for Deceased Worker Taxation
This step will only be initiated if the termination reason is death.

A to-do step will appear in the Payroll partner's inbox to create pay inputs for deceased worker taxation. Once updated, return to the inbox and select **Submit**.

Step 9d: Change Benefit Elections
When an employee has an eligible mid-year qualifying event, the employee will complete the following:

1. Navigate to the worker's **Benefit** page by selecting Benefits from the left side of the worker's profile.
2. Choose **Change Benefits**.
3. Select **Change Reason**.
4. Input **Event Date**.
5. Add documentation.
6. Select **Submit**.
7. Select **Open**.
8. Select **Let's Get Started**.
9. Make applicable changes.
10. Select **Review** and sign.
11. Select **I accept** (electronic signature).
12. Select **Submit**.

Step 9e: Manage Business Processes for Worker
This step will go to the (previous, if transferring agencies) agency's HR partner. There are three tabs to work through:

- **Inbox items assigned to worker** – if there is something in the worker's inbox, it will appear here. The business process, how many people the task is assigned to and the subject are all included on this tab. Choosing **Cancel** in the **Action** box will cancel the business process. Choosing **Reassign** will enable the HR partner to choose another worker to send the task to. Leaving it blank will leave it in the employee's inbox.
- **Business processes about the worker** – if there are any active business processes for the worker, they will appear here. This includes the change job currently in flight. Review each process and only check the box to cancel items that you are certain no longer apply to the worker.
- **Delegations to the worker** – if the worker has been assigned any delegations by other users, they will appear here.

Select **Submit** when complete.

Step 9f: Remove User-Based Security Groups
This step automatically completes.

Step 9g: Remove Worker from Talent
This step automatically completes.

MOVE WORKER (FILLED or VACANT)
Purpose: To move a position (filled or vacant) from one manager to another; replaces "Change Reports To" in PeopleSoft.

Who can initiate: HR executive, HR partner, HR specialist, Shared Services.

Step 1: Initiation
Search **Move Workers** in the search bar and select the corresponding task. Select the **Effective Date** and search for the correct supervisory organization, then select **OK**.

To move all workers in a supervisory organization to another supervisory organization, check the **Select All** box at the top then enter the new supervisory organization in the box above it. This will apply the change to all workers.

To move individual positions or workers to a new supervisory organization, select the box next to the worker's name or position number, then enter the proposed supervisory organization in the last column. Select **Submit** when complete.

Step 2: Review Organization Assignments
A pop-up with **You have submitted** will appear and show what the next step is. A to-do step will appear in the Finance partner's inbox with a reminder to review the position's **Organization Assignments**. If no changes to the **Cost Center** or **Time Off Eligibility Override** need to be made, select **Submit**. Otherwise, follow the link in the task to change organization assignments, then return to the inbox to select **Submit**.

Step 3: Verify the Position has the Correct Costing Allocation
A pop-up with **You have submitted** will appear and show what the next step is. A to-do step will appear in the Finance partner's inbox with a reminder to review the position's **Costing Allocations**. If no changes to the costing allocations need to be made, select **Submit**. Otherwise, follow the link in the task to update costing allocations, then return to the inbox to select **Submit**.

LONGEVITY/EDIT SERVICE DATES
Purpose: To edit an employee's service dates.

Who can initiate: HR executive, HR partner, HR specialist, Shared Services.

Step 1: Initiation
Search **Edit Service Dates** in the search bar and select the corresponding task. Enter the worker's name, then select **OK**.

Make changes as needed, then select the **Submit** button.

This is what each date is being used for:

Original Hire Date: The date this employee originally started with the state.
Continuous Service Date: Used to calculate length of service; same as Benefits Service and Time Off Service Dates.
Benefits Service Date: Used to calculate longevity payments; same as Continuous Service and Time Off Service Dates.
Company Service Date: The date this employee originally started with your agency.
Time Off Service Date: Used to calculate annual leave accruals; same as Continuous Service and Benefits Service Dates.
Retirement Eligibility Date: Only used by certain agencies.

Step 2: Approval
A pop-up with **You have submitted** will appear and show what the next step is. If initiated by someone other than the HR specialist, a review step will be sent to the HR specialist. During the review step, information may be changed as needed, then select **Submit**.

OKLAHOMA

ADD/MANAGE PROBATIONARY (TRIAL) PERIOD

Purpose: To add, update or review a trial period.

Who can initiate: HR executive, HR partner, HR specialist, Shared Services.

Step 1: Initiation

Search for the employee in the search bar. In the **Actions** under **Job Change**, choose **Manage Probation Periods.** There are several actions that can be taken from this page:

Add A Trial Period

To add a new trial period, select **Add** in the upper-left corner of the page. Choose the **Type**, verify the **Probation Start Date**, enter either the **Trial Period End Date** *or* **Duration** (the other field is calculated based on the value of the chosen field), a **Probation Review Date** and a **Note**. The **Note** in the probation review section is required. Select **Submit** when complete.

Review Existing Trial Period

To begin a review of an existing trial period, select **Start Review** on the **Trial Period** row. **Review Trial Period** should be used to end a trial period. A screen will appear that says, **Do you want to start a Probation Period Review?** Select **OK** to begin. The review step will go to the HR specialist's inbox. If the HR specialist is the initiator, then the review step can be accessed from the pop-up that appears after selecting **OK**.

In the review step, choose a **Probation Outcome** and an **Action**. The following options include:

- **End of Probation** – Choosing this option will end the probation period for the employee. Under **Action**, **Change Job for Review Probation Period** will kick off the change job business process (useful for career progressions after successful completion of a trial period) and **No Action Needed** will end the trial period on its scheduled date.
- **Extend Probation Period** – Choosing this option will enable the HR specialist to extend the current trial period.
- **Separation** – Choosing this option kicks off the termination process for the worker.
- **Trial Period – Return to Previous Position** – Choosing this option kicks off **Change Job for Review Probation Period**, which would enable agencies to send workers back to their previous position.

Select **Submit** when complete.

Edit Existing Trial Period
To make changes to or correct an existing trial period, select **Edit** on the **Trial Period** row. Choose the **Type** and **Reason**, verify the **Probation Start Date**, enter either the **Trial Period End Date** *or* **Duration** (the other field is calculated based on the value of the chosen field), a **Probation Review Date** and a **Note**. The **Note** in the probation review section is required. Select **Submit** when complete.

Extend Existing Trial Period
To extend an existing trial period, select **Extend** on the **Trial Period** row. Select a **Reason**, enter either the **Trial Period End Date** *or* **Duration** (the other field is calculated based on the value of the chosen field), a **Probation Review Date** and a **Note**. The **Note** in the probation review section is required. Select **Submit** when complete.

REQUEST COMPENSATION CHANGE

Purpose: To make changes to a worker's compensation, including base pay, allowances and longevity plan.

Who can initiate: HR partner, HR specialist, specialist, Shared Services.

Step 1: Initiation

Search **Request Compensation Change** in the search bar and select the corresponding task. Enter the **Effective Date** and employee name. Workday automatically selects the next pay period as the effective date. Changing the **Effective Date** will uncheck the box. Select **OK** to continue.

In the **Effective Date** & **Reason Box**, select a **Reason**. Add an **Employee Visibility Date** if you do not want the employee to see the transaction until a certain date. This is optional and can be skipped.

The **Guidelines** will automatically populate according to the job profile the worker is currently assigned to. Nothing needs to be changed or added here.

A box for both salary and hourly will appear. Please only use the pay rate type indicated in the job profile. Do not use both boxes. Use the **pencil icon** to update the **Pay Rate**. You can use the **Amount** box to enter the new salary or hourly amount for the worker, the **Amount Change** box to change the amount by a dollar amount, or the **Percent Change** to change the amount by a percentage. Changing one changes the others. Please only pick one box to amend.

To assign an allowance plan, select **Add** in the **Allowance** box, choose **All Compensation Plans** in the menu, then choose the appropriate allowance plan. You can also type in the allowance plan if you know what you're looking for. Enter the amount or percentage in the appropriate box. Percentages will automatically calculate the amount. To amend an existing allowance, select the **pencil icon** and make changes as needed. To remove an existing allowance, select the **X** next to the **pencil icon**.

Multiple allowance plans may be added. Allowance plans are optional and can be skipped if not applicable. Multiple allowances of the same type are not permitted; for example, you cannot have two **Skill Base Pay** (%) allowances.

In the final box, **Other**, ensure that all longevity-eligible positions are assigned the longevity pay plan. Select **Submit** when done.

Steps 2-9: Consolidated Approval Chain

For most agencies, the approval chain consists of:

a. The manager of the position.
b. The manager's manager.
c. HR partner.
d. Finance partner.
e. Agency assistant division director.
f. Agency division director.
g. Agency director.
h. Appointing authority.

Additional approvers can be added during each step of the consolidated approval process. Duplicate approval requests will not be sent if a previous approver is assigned to a subsequent role in the approval chain (i.e., if the Finance partner is also the agency assistant division director, they will only receive one notification and after it'll go to the agency division director). Roles that are blank will be skipped (i.e., if there's no appointing authority, it'll go from the agency division director to the agency director). Shared services agencies will have one approval go to the shared service group.

Approve sends the process forward. **Send Back** will send it back to a previous step. If there is a change that needs to be made, the process will need to be sent back to the first step and will need to go back through the approval chain. Select the **menu icon** in the **To** box to see all steps the process can be sent back to. Provide a **Reason** in the box below, then select **Submit**. To add additional approvers, select **Add Approvers**. Select the **menu icon** in the **Additional Approvers** box to see all approvers that can be added.

The button to the right of the **Add Approvers** will give the option to either **Deny** or **Cancel**. **Deny** will end the process and sends a notification to the initiator and manager of the position that the process is no longer moving forward. **Cancel** backs the user out of the task. The task will remain in the user's inbox.

ONE-TIME PAYMENTS

Purpose: To award a one-time payment, such as a signing bonus or moving expense reimbursement.

Who can initiate: HR specialist, Manager, Shared Services.

Step 1: Initiation

Search **Request One-Time Payment** in the search bar and select the corresponding task.

Enter the **Effective Date** and employee, then select **OK**.

In the **Summary** section, add an **Employee Visibility Date** if you do not want the employee to see the transaction until a certain date. Add a **Reason** if desired. **Employee Visibility Date** and **Reason** are optional and can be skipped.

In the **One-Time Payment** section, select **Add**. Select the one-time payment plan that best fits your needs, then enter the **Scheduled Payment Date** and **Amount**. The currency defaults to USD. Select the **Submit** when complete.

Step 2: Approval

A pop-up with **You have submitted** will appear and show what the next step is. If initiated by someone other than the HR specialist, a review step will be sent to the HR specialist. During the review step, information may be changed as needed, then select **Submit**.

FREEZE/UNFREEZE A POSITION

Purpose: To place a hiring freeze on a position, which prevents it from being filled.

Who can initiate: HR executive, HR partner, HR specialist, Manager, Shared Services.

Step 1: Initiation

Search **Manage Freeze Position** in the search bar and select the corresponding task. Search for the **Position**, then select **OK**.

Select a **Reason**, **Effective Date** and then check the **Frozen** box to freeze a position. If already frozen, uncheck the box to unfreeze. Select **Submit** when complete.

A position's freeze status can be found on the **Position Overview Tab** of the **Position Restrictions**, labeled **Hiring Freeze**.

Step 2: Approval

A pop-up with **You have submitted** will appear and show what the next step is. If initiated by someone other than the HR specialist, a review step will be sent to the HR specialist. During the review step, information may be changed as needed, then select **Submit**.