
CSU SYSTEM
COLORADO STATE UNIVERSITY

HR Partner Training

Training Structure

- **Overview Session:** These provide a high-level overview of your security role, including what access you have and what actions you can perform, as well as relevant reports.
- **Micro-Learning Session:** These are focused, task-based sessions that are dedicated to a specific task that the security group can perform.
- **Q&A Sessions:** These sessions provide an opportunity to ask questions and receive responses directly from subject matter experts.

Learning Objectives

By the end of this session, you'll be able to:

- Describe the purpose and scope of the HR Partner role within Workday.
- Identify the primary responsibilities of the HR Partner role and the tasks that you can complete in Workday.
- Search for and filter reports in Workday.

HR Partner Role Overview

What an HR Partner Can Do

- Ready for Hire and Onboarding
- Costing Allocations
- Job Change
- Period Activity Pay
- Move Worker / Transfer
- Organizational Assignments
- Add Job
- Start Disciplinary Plan/ Start Performance Improvement Plan
- Contract / End Contingent Worker
- Request One Time Payment
- Compensation Change
- Create Position
- Edit Position Restrictions
- Payroll Accounting Adjustments
- End Job / Termination
- Reporting Overview

What is an HR Partner?

A Workday HR Partner perform HR management functions for assigned Supervisory Organizations. Examples include creating and approving new positions, job assignments, and managing the job profile framework. This role is the approval authority for HCM business processes. HR Partners also have access to complete section 2 and reverifications of I-9 forms.

In short, the end-to-end employee lifecycle, from hiring and onboarding, tracking performance and job changes to employment separation.

Core Purpose of the Role

The HR Partner main purposes in the Workday system:

Receive and approve changes for New Positions, Job Assignments, One-Time Payments, Period Activity Pay, and Job Change.

An HR Partner can create a position, change jobs, request one-time payment or period activity pay, assign costing allocations, and terminate or end jobs.

How is the Role Assigned

- HR Partner is:
  - A position-based security role.
  - Assigned at the department or supervisory organization level.
  - Inherited by subordinate organizations.
  - Automatically transferred when a position is backfilled.

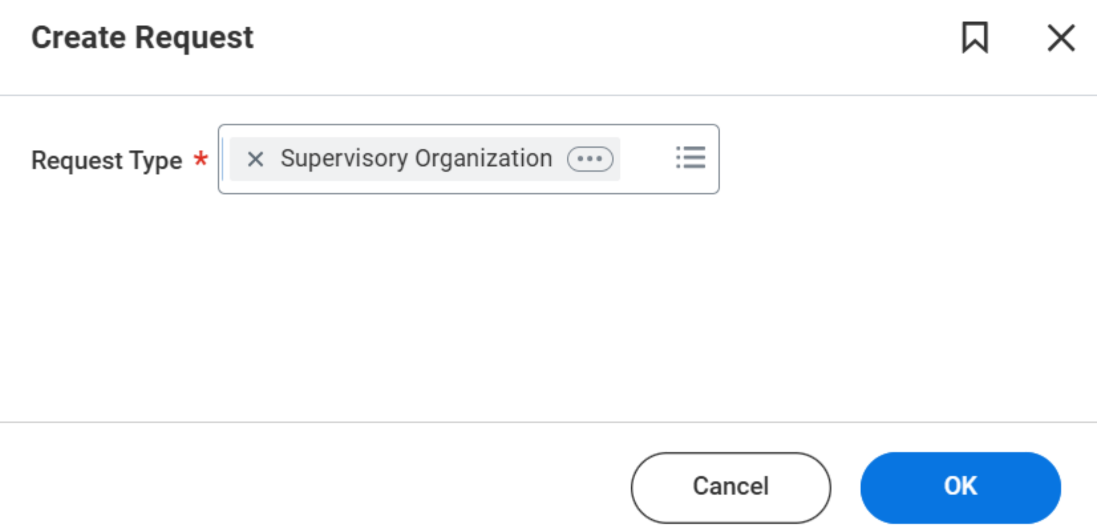
This design ensures continuity and reduce access risk during turnover.

How HR Partner Works with Other Roles

- An HR Partner works with the following security roles:
  - Compensation Partner – manages and approves the compensation
  - Finance Partner – manages the finances of payroll for an employee

What is a Supervisory Organization?

A Supervisory Organization (or "Sup Org") in **Workday is only created when a worker has direct reports.** If a current employee who does not currently manage others (i.e., has no direct reports) will now supervise a new worker, a Sup Org must first be created via the **Create Request Task in Workday** before the department proceeds with creating the new position (if position-managed) and job requisition.



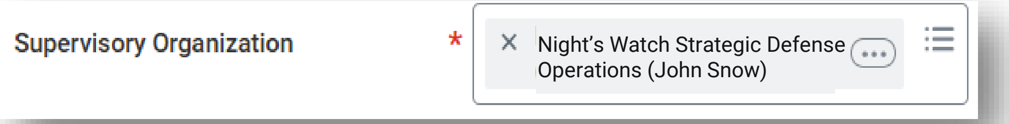
Workday supervisory organizations group employees under a manager to show reporting relationships, drive staffing and security assignments, and ensure that business processes – like hiring, position changes, and approvals—route to the right people in the organization.

Two Types of Supervisory Organizations in Workday

There are **two types of supervisory organizations** in Workday: position managed and job managed.

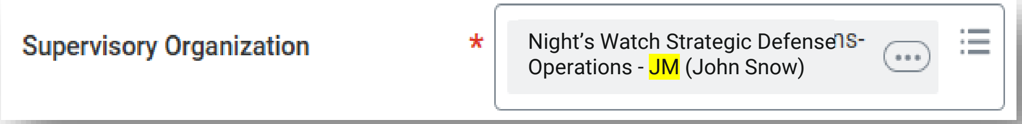
Position Managed

- **Used for:**
  - **Admin Pro, Faculty (not Adjunct), State Classified, Post Docs**
- **Requires:**
  - **Position**
- **Example:**



Job Managed

- **Used for:**
  - **Non-Student Hourly (NSH), Students, Adjuncts, and Graduate Assistants**
- **Requires:**
  - **No Position needed**
- **Example:**



General HR Partner Q&A

- What roles in Workday are expected for an HR team who performs basic HR functions at the college level and which roles should not be shared so there are proper checks and balances? For example, would an HR Generalist or HR Assistant who requests HR Partner, HR Compensation Partner and Finance Partner, be holding too many roles then removing the proper checks and balances between HR and Finance teams in a college?
  - *I think for right now, we have a lot of people who are HR partners and Compensation partners, and I think that's fine. That's the nature of how we've divided up the work is that we can have somebody who's responsible for several different functional areas. We have built business processes so that we have proper checks and balances even for people who have multiple roles.*

Reporting Overview

Workday Reports

Impact Area	Description
Real Time & Drillable Data	Workday Reporting provides real time, drillable data where you can have everything in one place. Think: Blue is a Clue!
Historical Data	Workday will maintain a history of data starting in January 2026. **Note:** For data, prior to January 5, 2026, you can contact HR for assistance in accessing historical data that you need access to.

Workday Search

The **Search** bar on the Workday homepage, allows you to access reports. Workday will list the related tasks or reports as soon as you type in a few words.

Workday Search
• Find List of Reports • View Spotlight Reports • Run Specific Reports • Leverage Tags and Prefixes • Access Dashboards

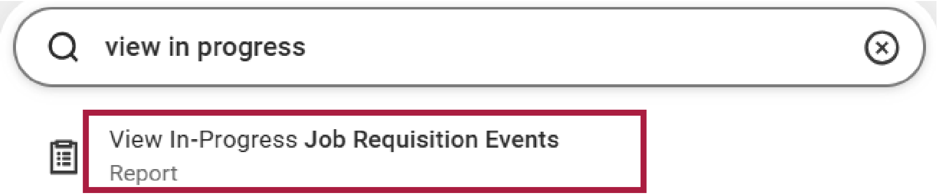
The **Search and Generate Reports** guide provides steps on how to search for and generate reports in Workday.

Note: Standard reports automatically open and custom reports allow you to add additional features.

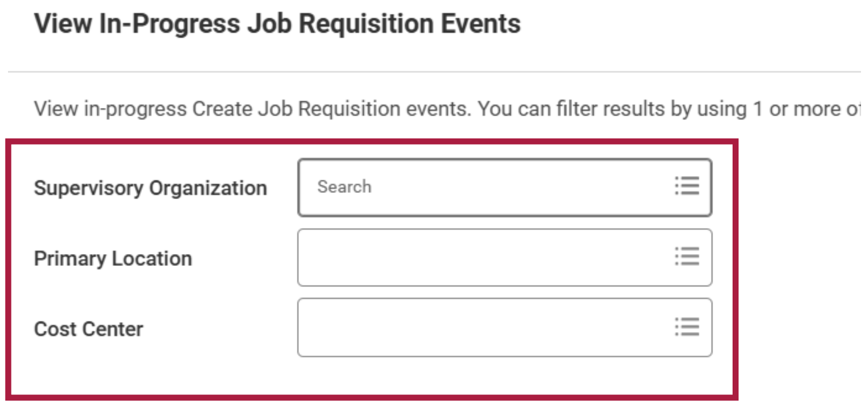
Searching Workday for Specific Reports

From the Workday Search bar, you can also access **specific and custom reports** you would like to run and view.

To Start – Type the name of the specific report in the search field. For example, you can search "**View In-Progress Job Requisition Events**" and select the report.



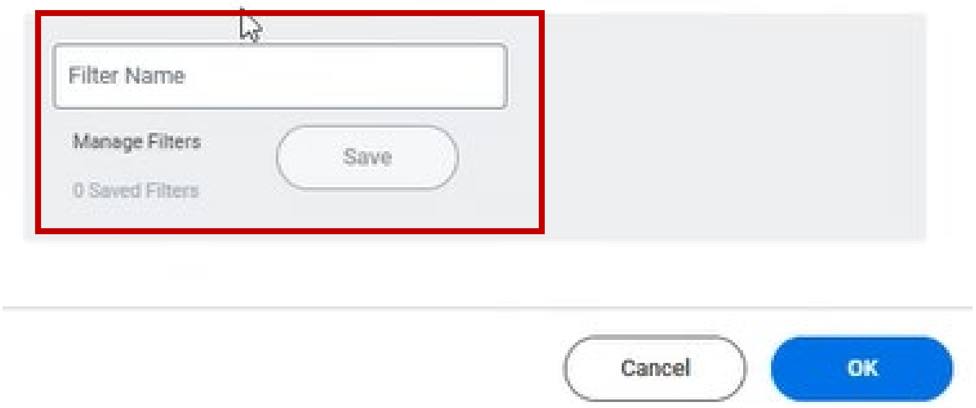
Report Prompts – You will then be navigated to a screen with multiple fields. These fields allow you to **filter** criteria to **narrow down** your search and **display specific information**. You can use these field to **customize** your report to match your **specific needs**.

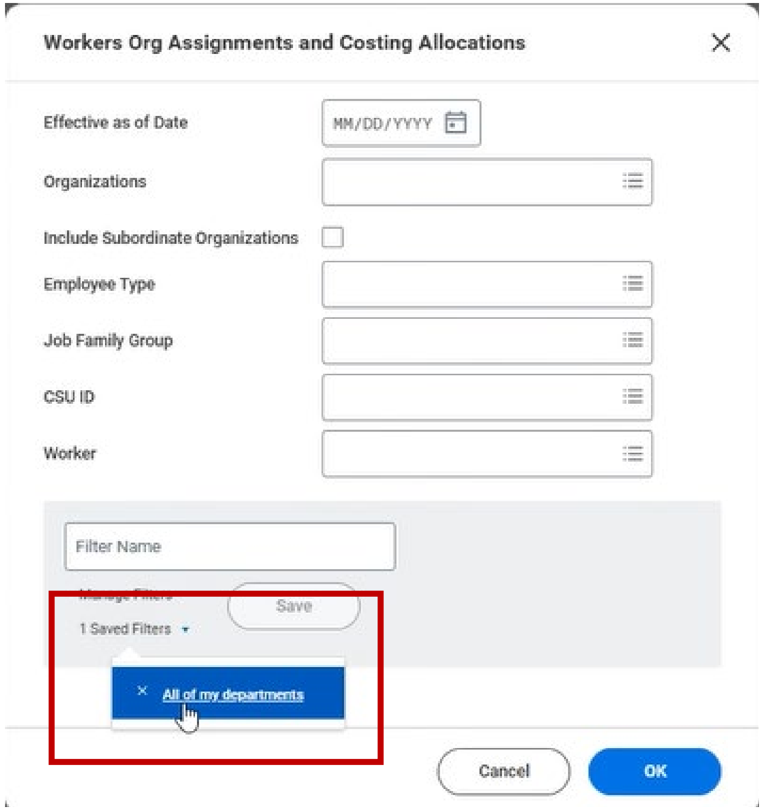


Please Note: *The available fields may vary from one report to another.*

Filtering the Report Fields

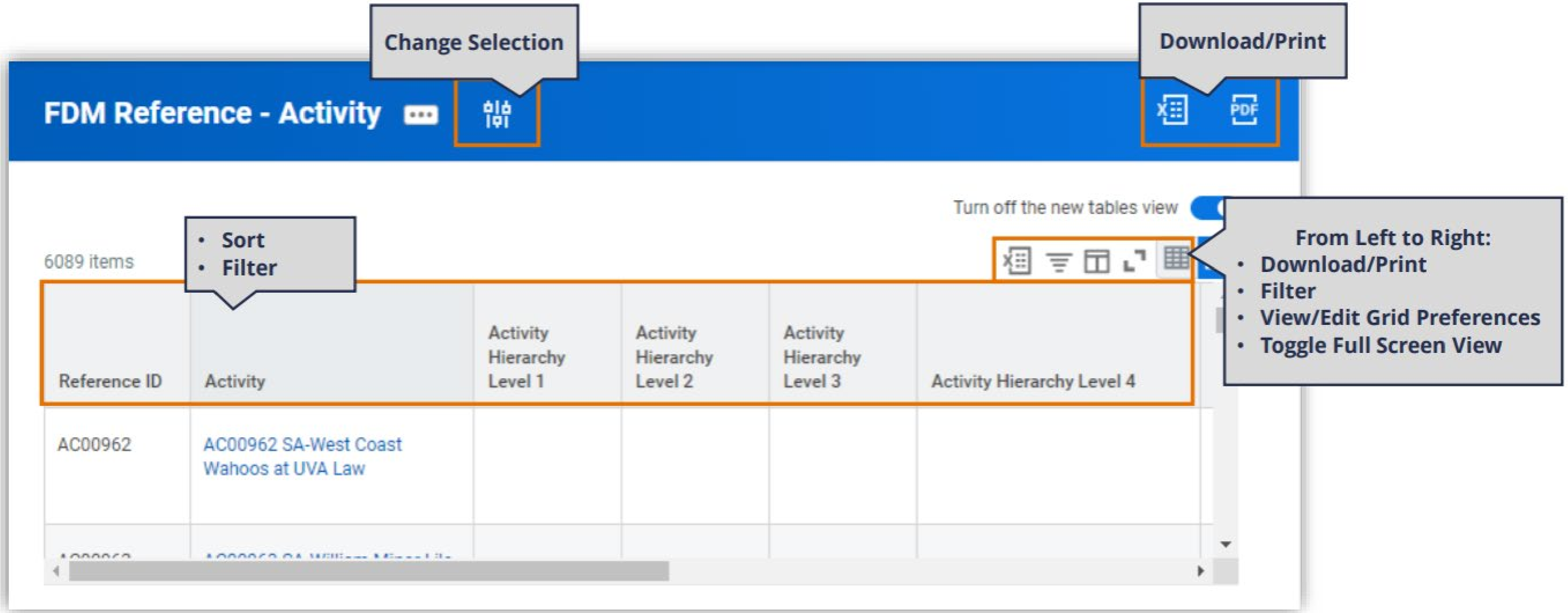
To save the report fields, select the options from a field, for example, Organizations, enter a **Filter Name**, and select **Save**. Next time you run the report select the option from the **Saved Filters** dropdown menu and options will automatically populate for the field.





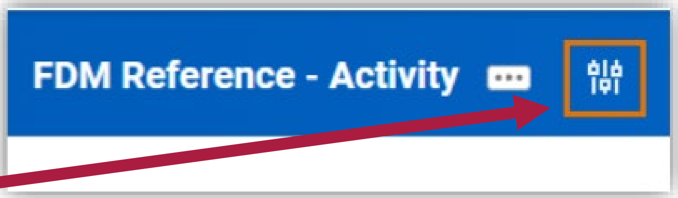
Report Functionality Overview

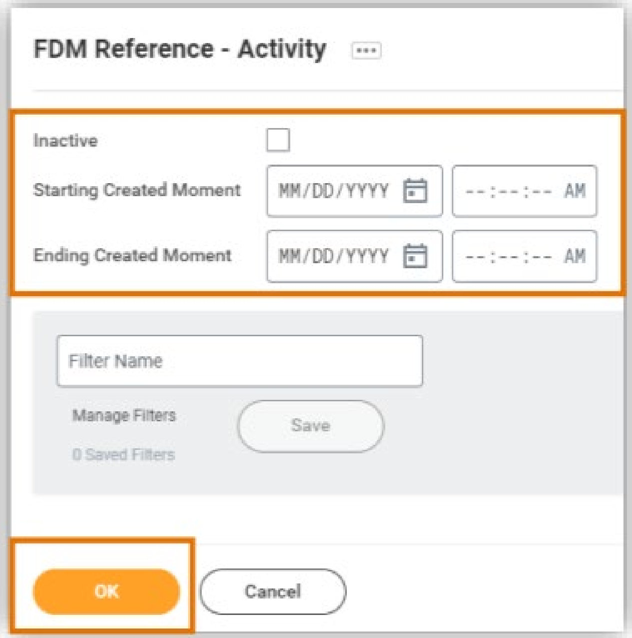
When viewing a report, there are various **reporting functionalities** available in Workday. Each functionality is displayed in the form of icons that represent various actions you can perform.



Change Selection

- **Change Selection** is used to reset, update, or change the prompt settings of the report.
- Select the **Change Selection** icon to change the data displayed in your report. These fields allow you to update or add any **filter** criteria. You can use these prompts to **customize** your report to match your **specific needs**.

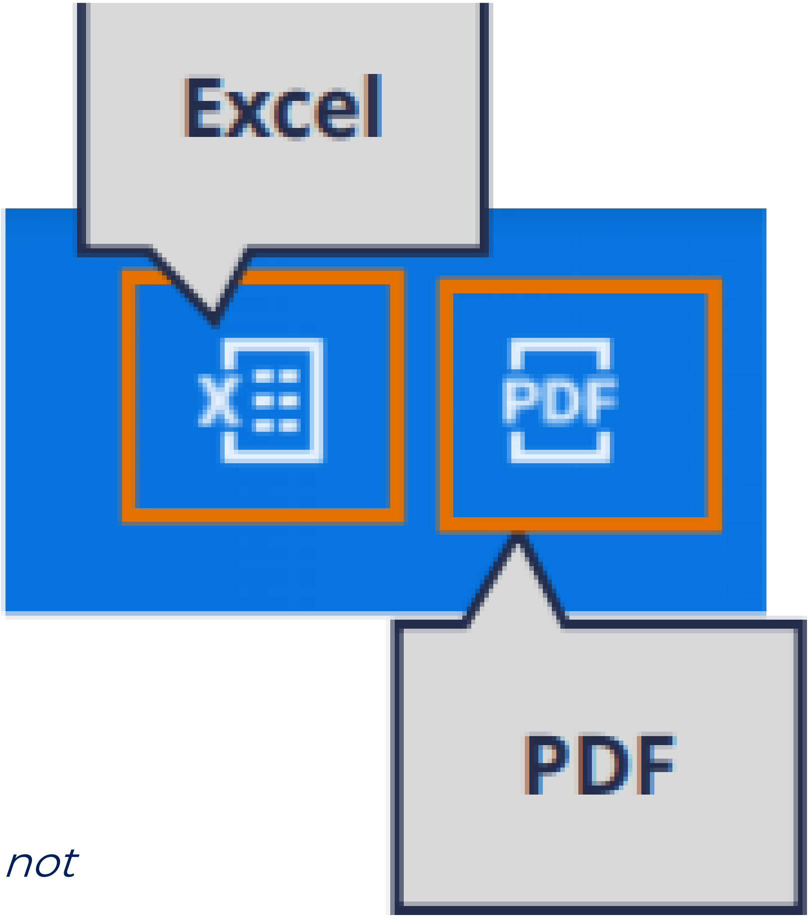




Please Note: The available fields will vary from one report to another.

Download / Print Report

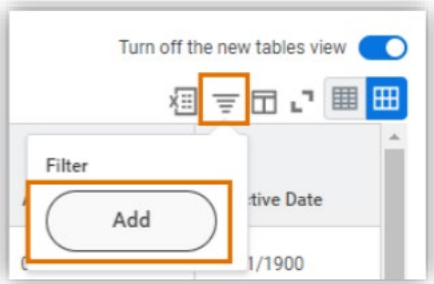
- By selecting the **Download/Print Report** icon you can download a report into a PDF or an excel format by selecting the appropriate icon. Once the report is exported, you can print directly from the document.
- To **download** and **print** document:
    - Select the icon and then click **Download** button to start downloading.
    - Once finished, you can view the downloaded document at the top right corner of the screen.
    - Open the downloaded document to view and initiate printing.

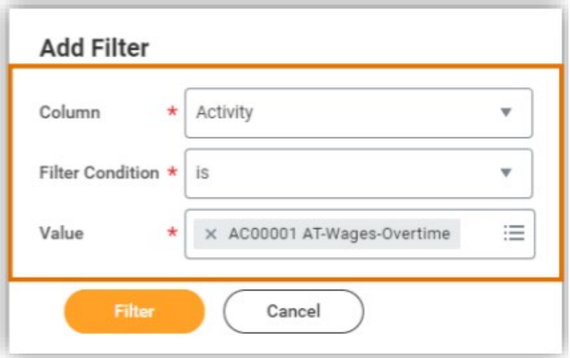


Please Note: If you applied any filters to the report, this would not appear in your downloaded report as any changes are only applied to your current view in Workday.

Filtering the Report

- Filters can be used to hide any data you don't want to see. You can filter reports by selecting the **Filter** icon and then the **Add** button.
- In the dropdown, select the appropriate column for which you want to apply the filter to. From there you can indicate:
  - **Column:** The column you want to apply the filter to.
  - **Filter Condition:** You can select the options, **is**, **not equal to**, or **is empty**. These conditions identify the type of data you want to contain (is), do not want to contain (not equal to), to contain no data (is empty).
  - **Value:** The specific information that drives your filter (i.e., specific data you want to directly filter in or out)

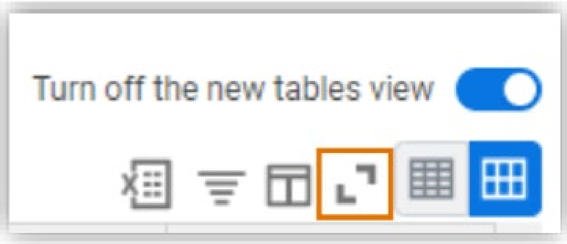




Please Note: If you applied any filters directly in the report, your download would still include the original prompted dataset. To download the filtered dataset, rerun the report with those selections applied to filters. Once applied, these changes will be reflected in your report.

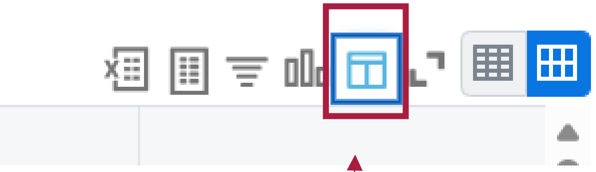
Toggle Full Screen View

- To view the report in full screen, click the **Toggle Fullscreen Viewing Mode** icon.
    - This will **hide** the Workday Toolbar, and other Workday functionality displayed above or below the report.

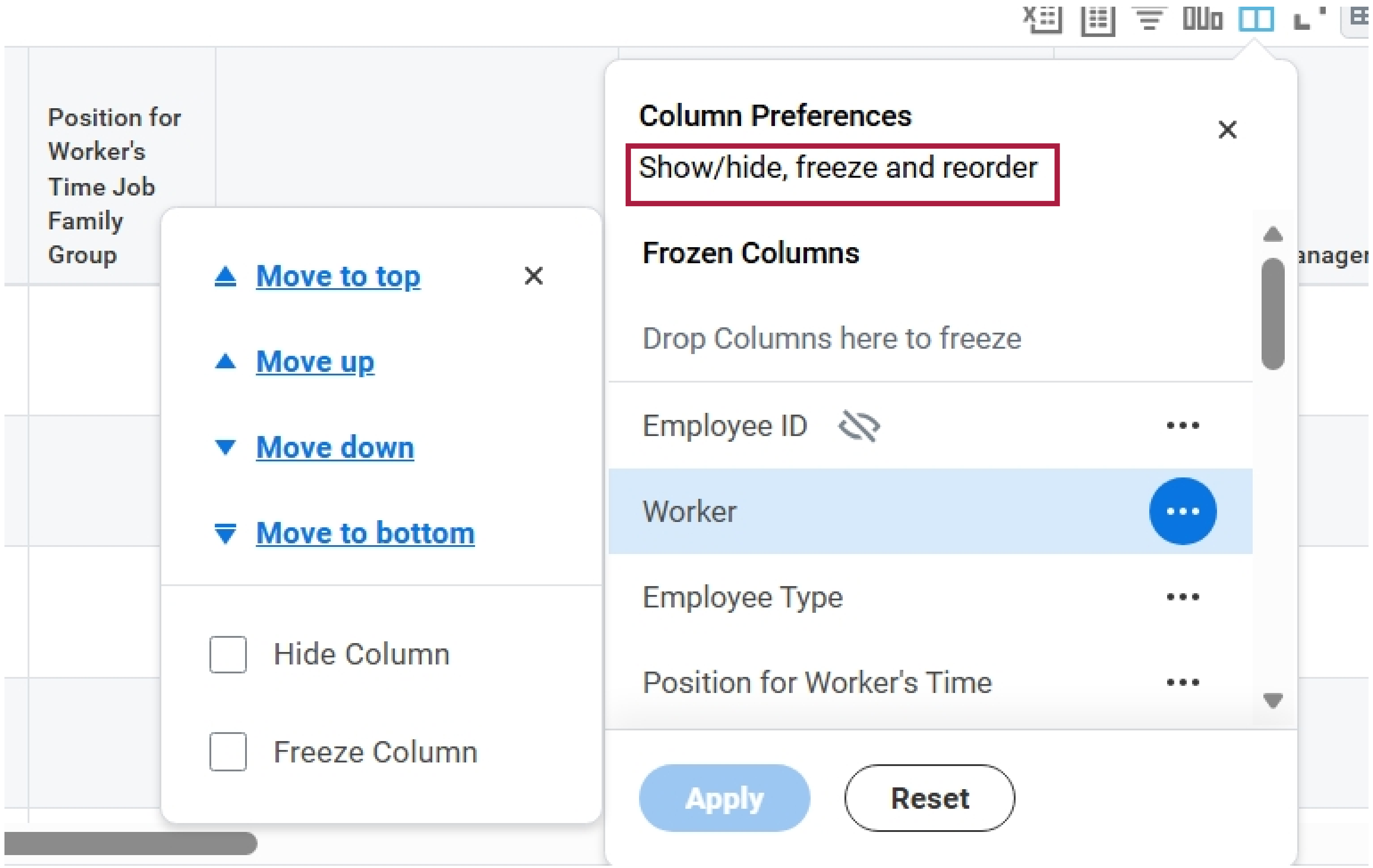


- To **exit out of full screen** mode, select the **Toggle Fullscreen Viewing Mode** icon again.
    - This will **redisplay** the Workday Toolbar and other Workday functionality displayed above or below the report.

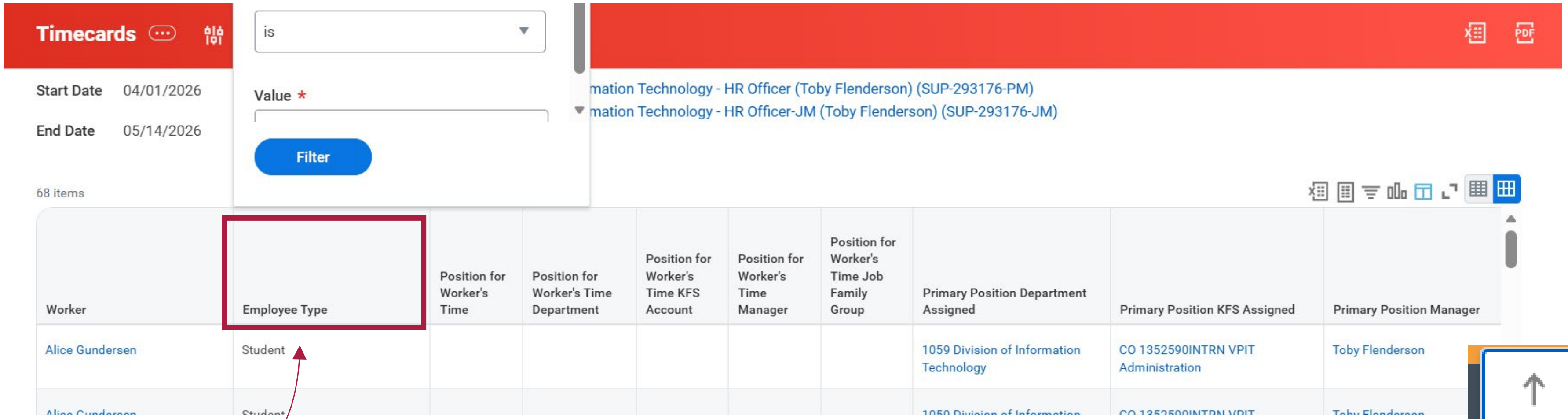
View/Edit Grid Preferences



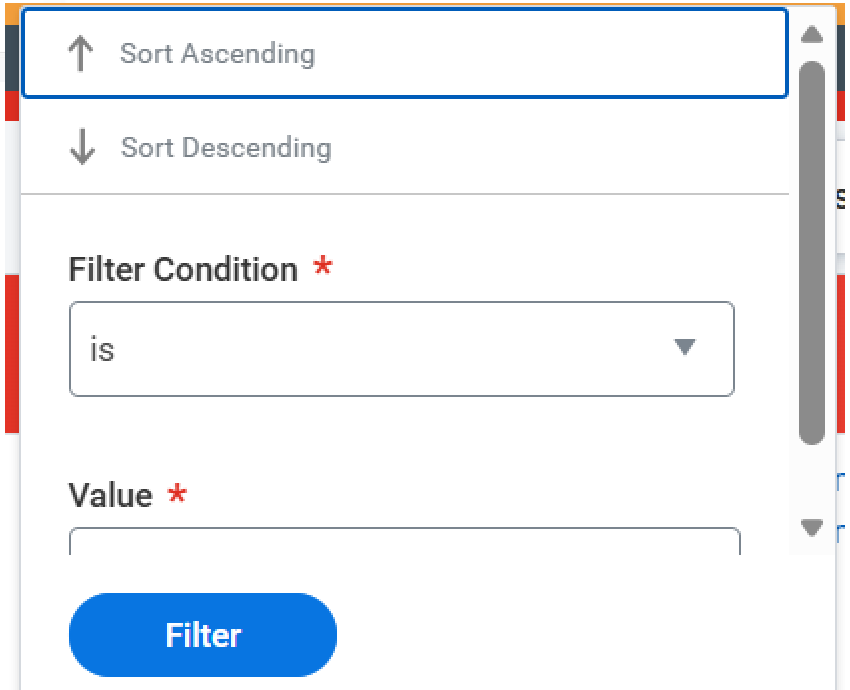
The **'View/Edit Grid Preferences'** button allows you to reorganize and hide data columns when viewing reports. This allows you to focus on the most important fields.



Sort + Filter Specific Report Columns



Select any Column Header in any report to sort column or specifically filter the column.



Running and Scheduling Reports

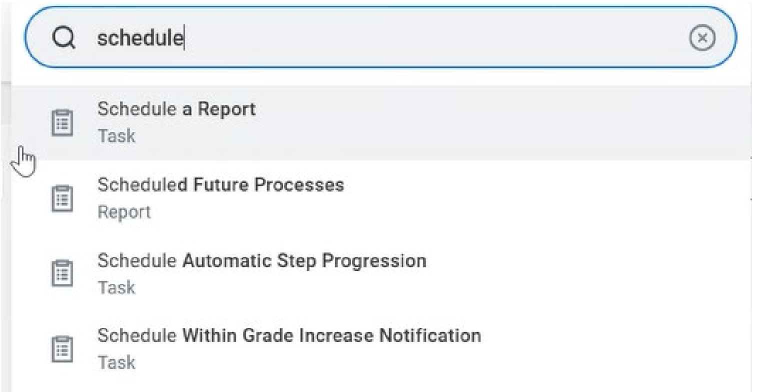
Running Reports and Scheduling Reports

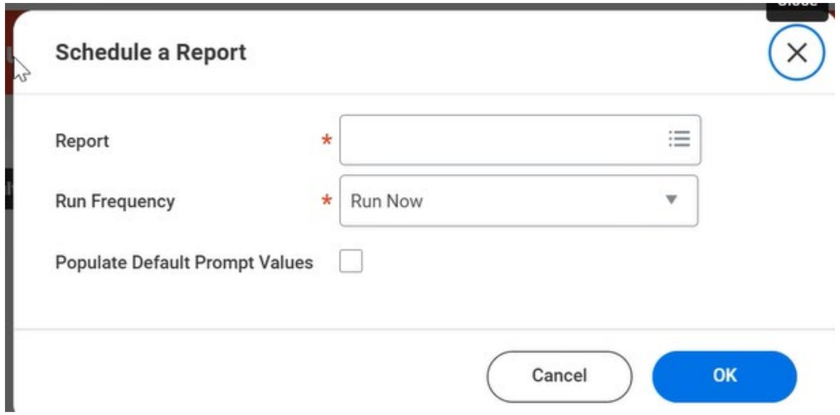
There are two main ways to run reports in Workday:

1. Running the Report manually:
   - Search for the Report or select from Reports worklet
   - Enter report parameters for which you want to run the report
2. Scheduling the Report:
   - Schedule the report to be delivered in your inbox at a specified time interval

Scheduling a Report

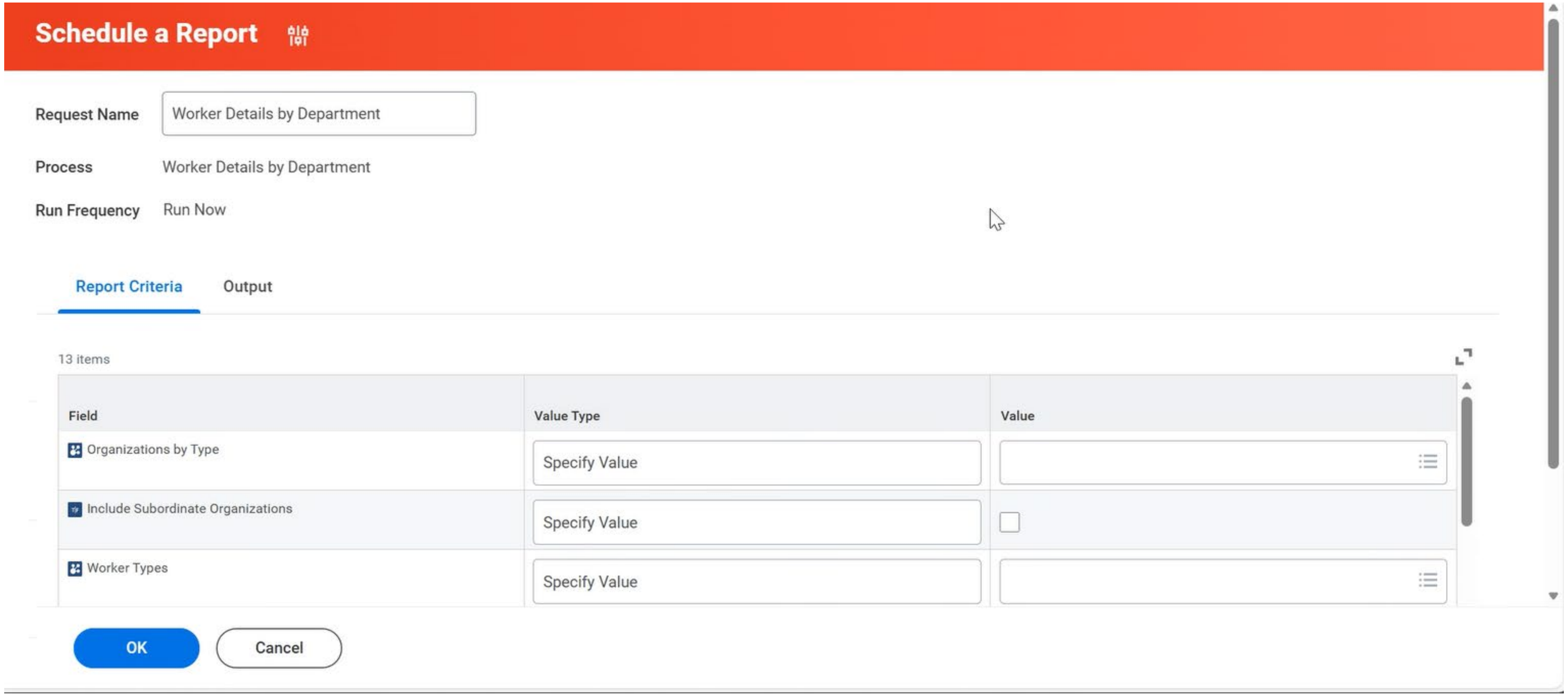
1. Search for the **Schedule a Report** task using the Search bar.
2. Specify the **Report** name and the Run **Frequency** of which you want it scheduled.





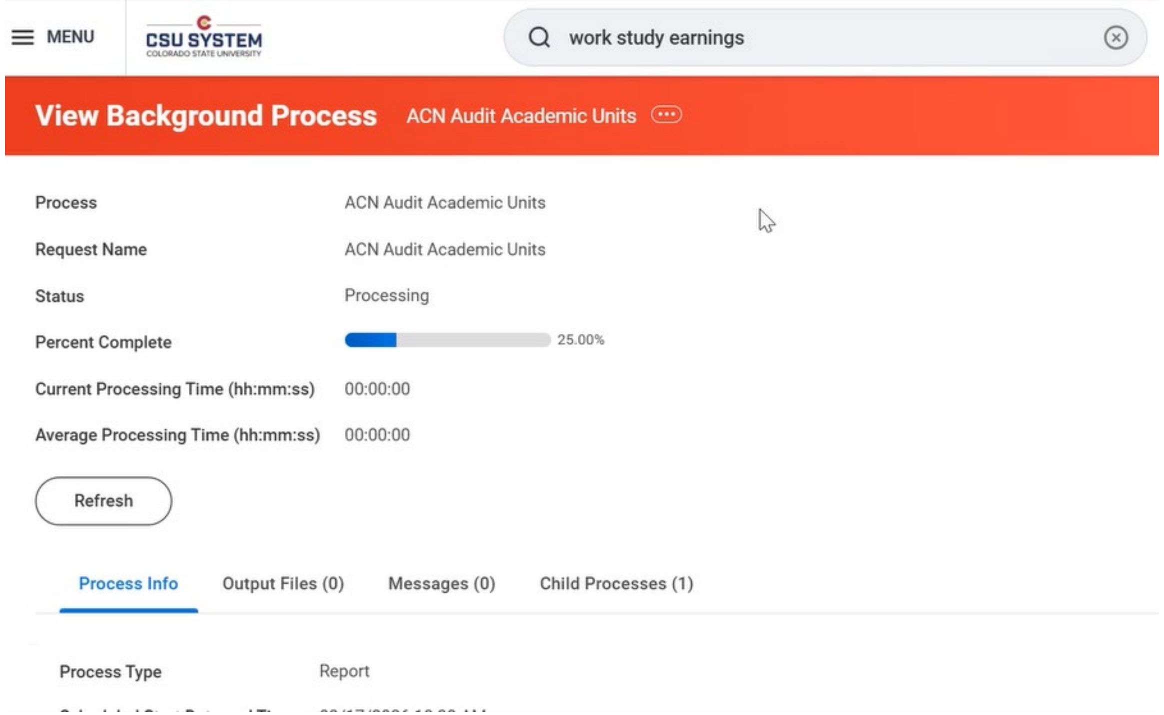
Scheduling a Report, continued

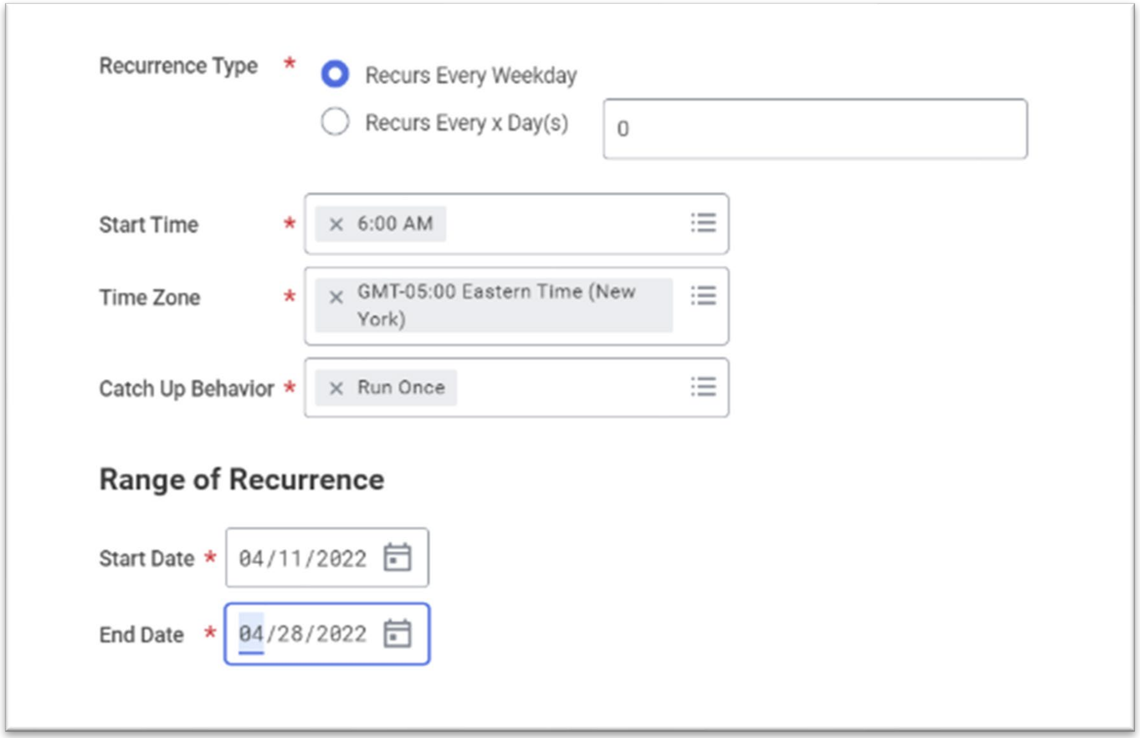
3. Specify the parameters for which you want the report to run. These are the same parameters that you would enter if you were running the specific report manually. For example, select Worker Type = Student.



Scheduling a Report, continued

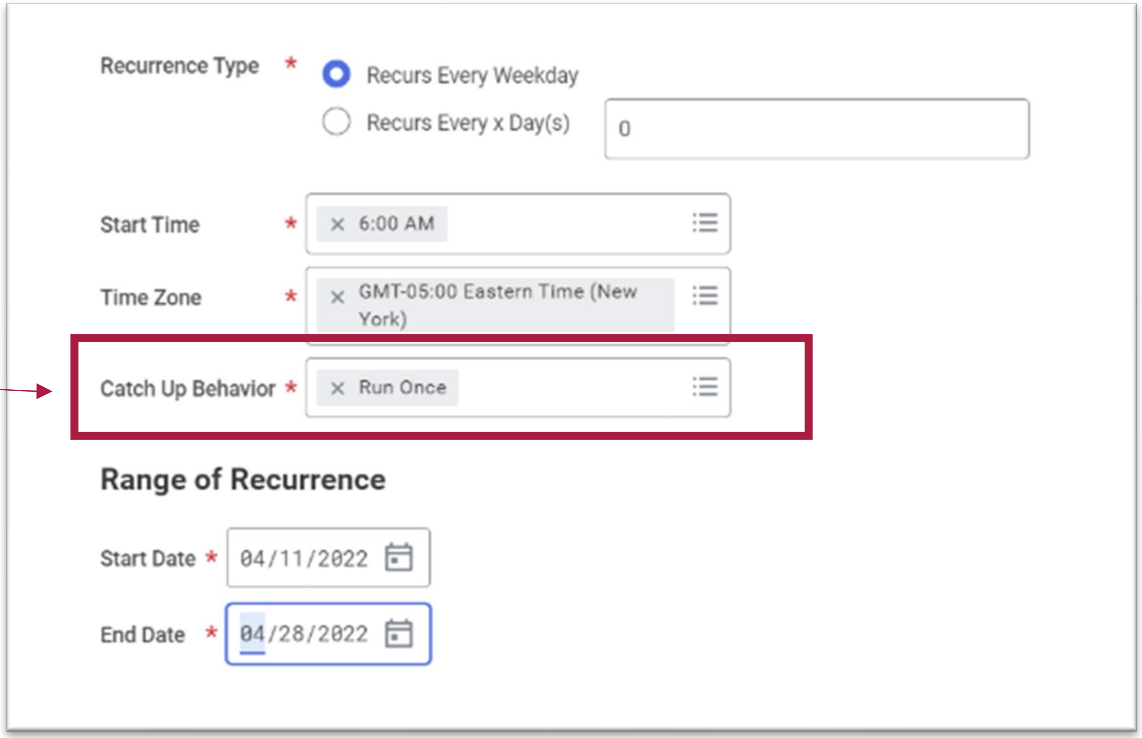
4. Specify the **Frequency Details** for which the report will run.
5. View Background Progress shows the progress of the reports.





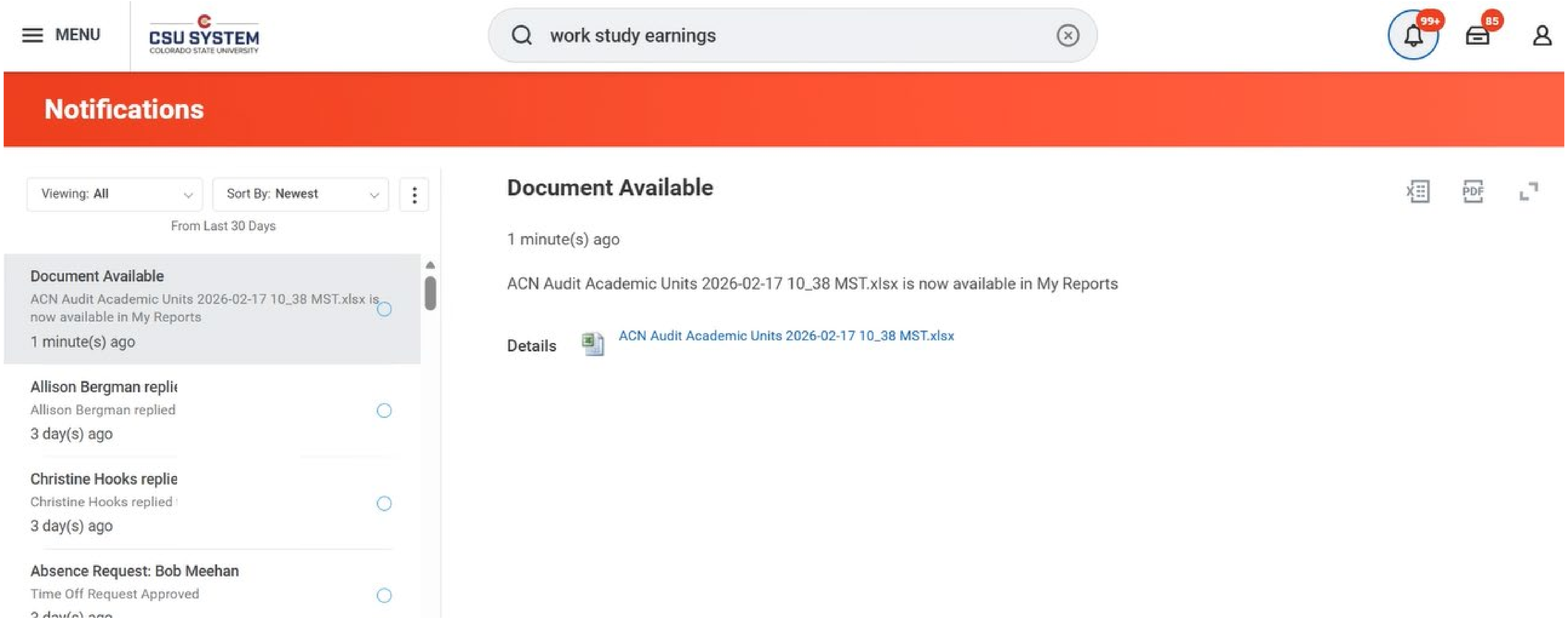
What is Catch Up Behavior?

- Catch-up Behavior determines how the system handles missed scheduled runs (e.g., during outages or maintenance) to ensure critical processes are managed appropriately after recovery.
- There are two options to select:
  - **Run Once:** One report runs after recovery. Executes a single instance after the system is restored.
  - **None:** Missed reports are skipped.



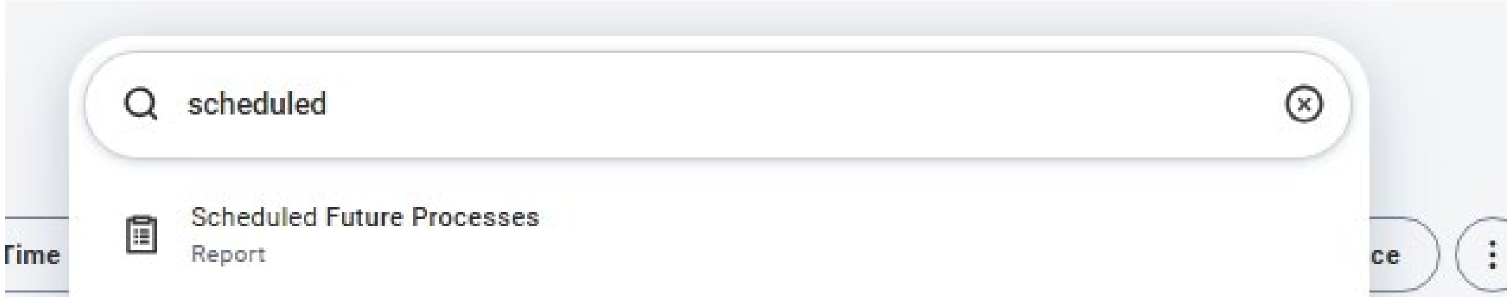
Scheduling a Report, continued

6. Reports delivered to you will show up in your **Notifications**.



Cancelling Scheduled Reports

In Workday, you can edit or cancel a scheduled report by using the **Scheduled Future Processes** task. Please refer to the **How to Suspend a Scheduled Report** guide for the step-by-step process.



Reports Q&A

- When I run the report "CSU All Reports I Can Run" I get hundreds of results, yet many of the reports I click on give me an error saying "Page Error Attempt to run a report where you do not have access to one or more fields referenced in the report's filters. Fields: Pay Group". If I do not have access to this report, then why does it show up with the "CSU All Reports I Can Run" report? It is confusing and makes it harder to find the reports I can run.
  - *There are different ways that reports are made available to people, and a lot of reports were developed by our implementation partners with just a general share with any group that could run them. But that unfortunately doesn't mean that they can necessarily run them. It just means that they can pull up the report and initiate it, but if they don't have access to one of the filters or some of the data that it returns, it's not really a useful report to them. We're still working on the best way to identify reports that work well.*
  - *The HR Partner Hub has a list of reports for the HR Partner role.*

What an HR Partner Can Do

Ready for Hire and Onboarding

What is Ready for Hire and Onboarding in Workday?

Ready for Hire and Onboarding in Workday marks the transition from recruiting to employment. For jobs requiring requisitions, the recruitment process concludes when the selected candidate is moved to **Ready for Hire**, which triggers the appropriate downstream process. If the candidate is not a current employee, the **Hire** business process begins automatically, along with onboarding tasks (some steps may auto-complete). If the candidate is an existing employee, either the **Change Job** or **Add Job** business process is selected during the Ready for Hire step and then initiated automatically.

In limited cases, a requisition is not used—such as hiring **Graduate Assistants (Hire Student)** or adding an additional job for a current student employee (**Add Job**) within the same supervisory organization. In these scenarios, the Hire or Add Job process can be initiated directly.

Who Can Complete the Ready for Hire and Onboarding?

- HR Partner – Kicks off the Ready to Hire
- HR Partner and Manager – Onboarding Setup
- Employee – Onboarding Setup
- HR Partner – Generate Document for Hire (SSA 1945)
- Employee – Onboarding Process

How the Ready for Hire and Onboarding Process Works

At a high level, the Ready to Hire and Onboarding includes:

1. Moving a Candidate to Ready for Hire withing a job requisition.
2. Kicking off the Onboarding Setup
3. Generating Documents for Hire (if new employee)
4. Employee Onboarding Steps

The **Ready for Hire and Onboarding** guide provides a walkthrough of the hiring and onboarding process for a new employee in Workday.

Note: This example goes through the process for a new faculty member; however, the process is generally the same for faculty, AP, SC, and NSH. If the individual being hired is a current employee, the process will differ, and either the Job Change or Start Additional Job process is used.

Important Considerations

- **Fixed Term employee types** must include an **End Employment Date**. This is required for the hire to process successfully and ensures the job ends appropriately in Workday.
  - End Employment Date does **NOT** automatically terminate the employee or stop their pay. Unless an employee is terminated by the HR Partner, they will continue to be paid.
- **Location vs. Workspace: Location** typically represents the building, while **Workspace** reflects the specific room or area. Ensure both are accurate, as they can impact reporting and downstream processes.
- Once the Hire process is complete, an **Onboarding Setup** task is generated for the **HR Partner and Manager**.
- The **Onboarding Setup task must be completed** before the new hire can begin onboarding in Workday. Delays in completing this step will delay the employee's onboarding start.
- After the hire is finalized, a **CSU ID is generated** through the Banner integration.
- The new hire will receive an **automated email** with their CSU ID and instructions to activate their **NetID** and log into Workday to begin onboarding.
- Ensure the **start date is accurate and, in the future,** as onboarding tasks and system access are tied to this date. Backdating or incorrect dates can cause delays or compliance issues (e.g., **I-9 timing**).
- **I-9 requirements must be completed on or before the employee's first day of work.** Do not allow employees to begin working prior to completing required employment verification steps.
- **Review key hire details carefully** (e.g., job profile, compensation, supervisory organization), as corrections after hire may require additional transactions and approvals.

Ready for Hire and Onboarding Q&A

- We like to save our open pool applicants to review throughout the year. There are people who like to look at these who do not really use Workday. I want to download the files for all my candidates for a position to save on our server. We used to be able to do this in TMS where we could save the applicants information and uploaded documents, but I haven't found a way to do this in Workday. Is this possible?
  - *Yes, it is possible for the Primary Recruiter and Hiring Manager to bundle and download resumes from a job req (other roles may also be able to do this i.e. search chair, search assistant but this needs to be tested to confirm).* ***Note:*** *If someone needs access to view an Evergreen (open pool) candidate pool, the Primary Recruiter also can add folks as Search Committee Members as well as remove them as needed. Once added, they will have access to view candidate materials directly in WD.*
  - *This guide walks through the steps of assigning roles on a job req: https://scribehow.com/o/uS-xsZjVRDWg94vUvVs5FQ/viewer/How_to_Update_Add_or_Remove_Assigned_Roles_to_a_Job_Requisition__IMJOi2hQT1CeZGdDhEz95A*
- Is it possible to have two hiring authorities? It was in TMS but it didn't seem like I could do that in Workday. My department likes to have the director and assistant director both as hiring authorities. How can I make it so that both can view and access our temporary faculty open pool?
  - *Not possible from a system perspective. The Hiring Manager (aka Hiring Authority) is based on the sup org in which the new role resides, and it is not possible to add more than one. A solution could be to list the actual manager as the hiring manager (by creating the job req in their sup org) and then adding the other person as a search committee member or search chair. Note, search CHAIR has the option to take action on candidates. If you want the person to only VIEW candidates, they should be added as a committee member.*

Ready for Hire and Onboarding Q&A, continue

- Is there a way to run a background check without going through a new requisition? For example, volunteers or internal promotions requiring motor vehicle check.
  - *Create a case under "Background Check – other" and let them know that you have volunteers that you need to run a BGC for.*
- When hiring an existing CSU employee (usually an hourly employee) we are often prompted to change the primary job for the employee. What if we don't want to change the primary job? Can we remove that task?
  - *The task was removed except for students, non-student hourlies, and grad students.*
- We still can complete the Employment Verification within 3 business days of the start date, as we have had in the past, correct?
  - *Employees need to complete Section 1 by Day 1*
  - *HR needs to complete Section 2 by Day 3*

Ready for Hire and Onboarding Q&A, continue

- When a current student employee applies to a new job through Workday, should we move them through all the workflow stages through the Job Requisition, or just separately add a job for them?
  - *They should proceed through the candidate stages for the second job. This ensures they receive an additional offer letter for this new role.* ***Note:*** *If the second job is only being added for accounting purposes i.e. they need to log hours for the same job to different project accounts, please reach out to TA.*
- Could you clarify what happens when hiring student workers after the supervisor hits the "Ready to Hire" button in the requisition? Do they then go to background check? Do the employees receive an email they need to approve the background check? We have a few students who we hit ready to hire but are not sure what the holdup is because we have not received the "Hire" task over a month later.
  - *The background check occurs earlier on in the search process before the student candidate is moved to Ready for Hire. (Screen --> Offer --> Background Check --> Ready for Hire).*
  - *What happens after a student is moved to ready for hire depends on if the student is a NEW employee or a current employee receiving an additional job. It also depends on if the student is moving into a Work Study job profile.*
  - *If New Student Employee without WS: The “Hire” business process should route to the HR Partner to fill out.*
  - *If New Student Employee with WS: The “Hire” business process will first route to Student HR Employment to confirm the student’s WS eligibility. Once confirmed, the task will route to the HR Parter.*
  - *If Current Student Employee without WS: The ‘Add Job vs Change Job’ determination task will route to the Student HR Partner. Once they make the appropriate selection, the Add Job (in most cases) or the Change Job business process will route to the HR Partner.*
  - *If Current Student Employee with WS: The ‘Add Job vs Change Job’ determination task will route to the Student HR Partner. Once selected, the WS eligibility task will also route to the Student HR Partner. After eligibility is confirmed, the Add Job or Change Job task will route to the Student HR Partner.*

Assign Costing Allocations

What are Costing Allocations?

Costing Allocations in Workday allow an organization to **override the default funding source that comes from an employee's organizational assignments,** so payroll expenses post to the correct cost centers or KFS accounts.

Costing Allocations are commonly used when:

- Payroll must be spilt across multiple funding sources
- An employee is partially or fully funded by a grant
- Funding is temporary or time-bound
- Payroll needs to post somewhere other than the default org

Who Can Create or Edit Costing Allocations

Costing Allocations may be initiated by:

- HR Partners
- Finance Partners
- Business Officers

This is done using the **Assign Costing Allocation** task in Workday.

Before You Start (Helpful Checks)

Confirm all the following:

- ✓ The issue affects current or future payroll
- ✓ The employee's pay amount is correct
- ✓ The correction is about **WHERE** payroll is charged
- ✓ You have HR Partner security

How Costing Allocations Work

Costing Allocations override the default funding source that comes from an employee's organizational assignments.

The **Assign Costing Allocations** guide provides steps on how to assign costing allocations in Workday.

The **View and Edit Costing Allocations** guide provides steps on how to view and update existing costing allocations.

Assign + Edit Costing Allocations Process End to End

HR Partner:

Initiates ‘Assign Costing Allocation’ Task

→

Costing Allocation Becomes Effective Immediately After Submission

What Costing Allocation are *NOT*

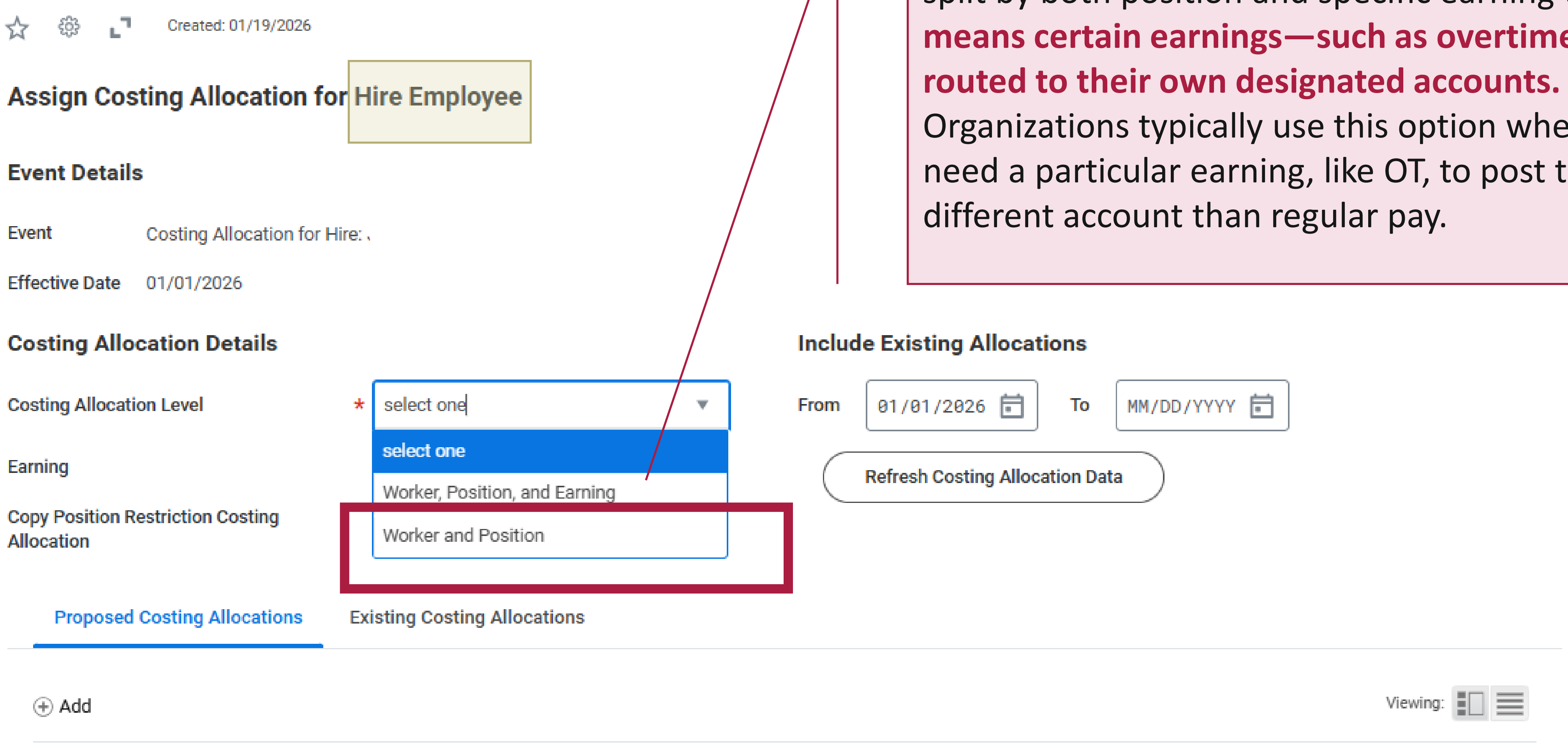
Costing Allocations:

- ✗ Do **NOT** change pay amounts
- ✗ DO **NOT** alter job or position details
- ✗ DO **NOT** correct payroll that has already posted

Common Mistakes to Avoid

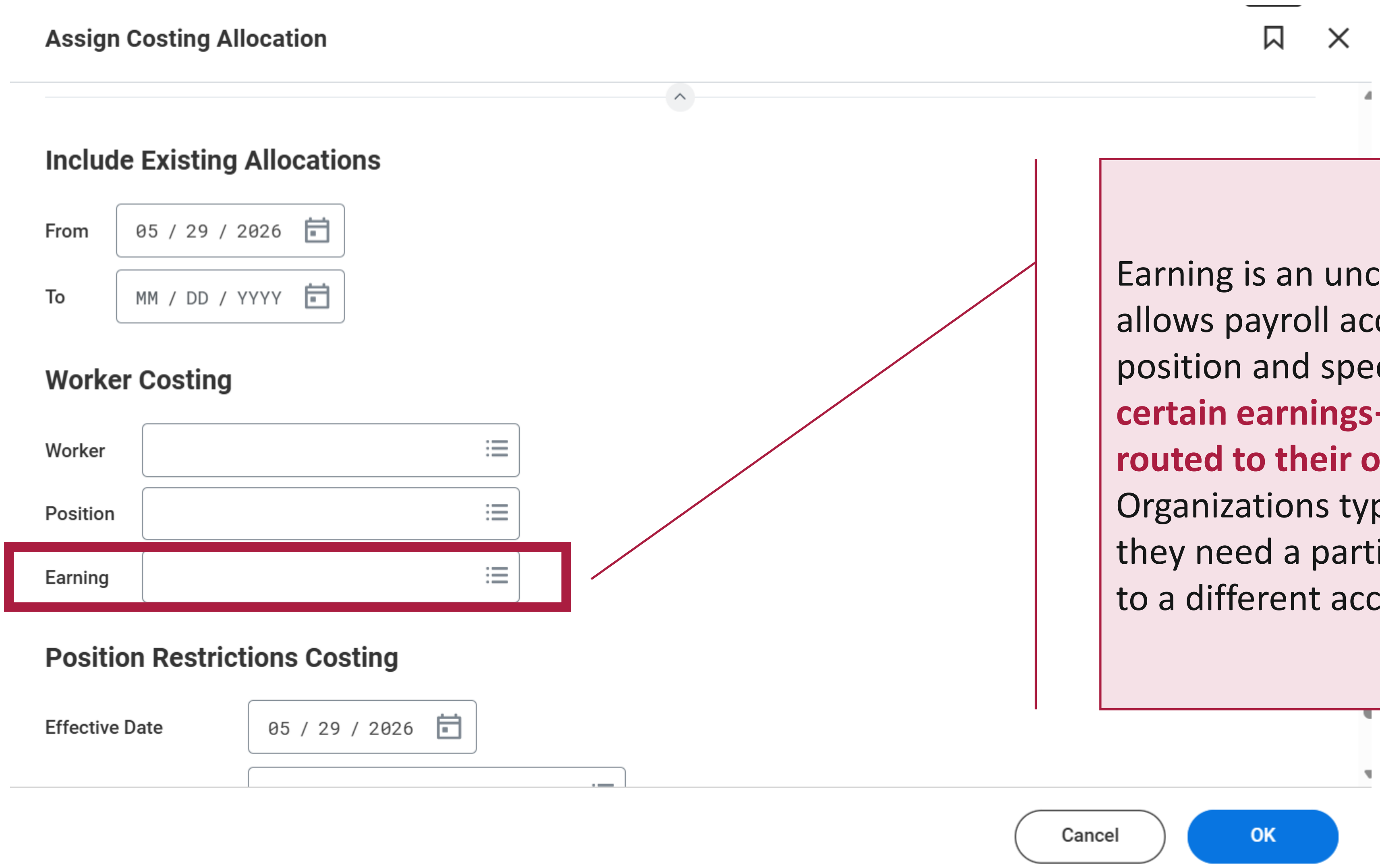
- ✕ Using Costing Allocations to fix past payroll
- ✕ Forgetting an end date on grant funding
- ✕ Percentages not totaling 100%
- ✕ Entering an earning unnecessarily (leave blank unless explicitly required)

Select 'Worker and Position'



Worker, Position, and Earning is an uncommon configuration that allows payroll accounting to be split by both position and specific earning types. **This means certain earnings—such as overtime—can be routed to their own designated accounts.** Organizations typically use this option when they need a particular earning, like OT, to post to a different account than regular pay.

When in Doubt = Leave Earning Field Blank



Earning is an uncommon configuration that allows payroll accounting to be split by both position and specific earning types. **This means certain earnings—such as overtime—can be routed to their own designated accounts.** Organizations typically use this option when they need a particular earning, like OT, to post to a different account than regular pay.

Costing Allocations vs. Payroll Accounting Adjustments (PAAs)

A frequent point of confusion:

- Costing Allocations

    Affect current and future payroll

    Used to control where payroll *will* post

- Payroll Accounting Adjustments (PAAs)

    Used to fix past payroll postings

    Do not prevent future errors on their own

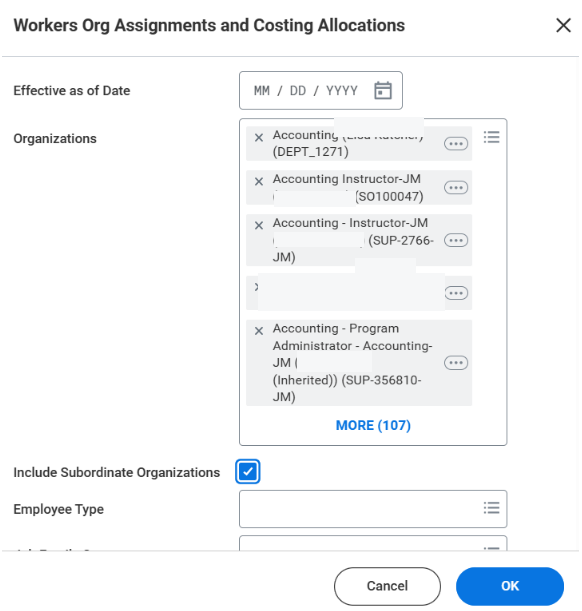
Best practice:

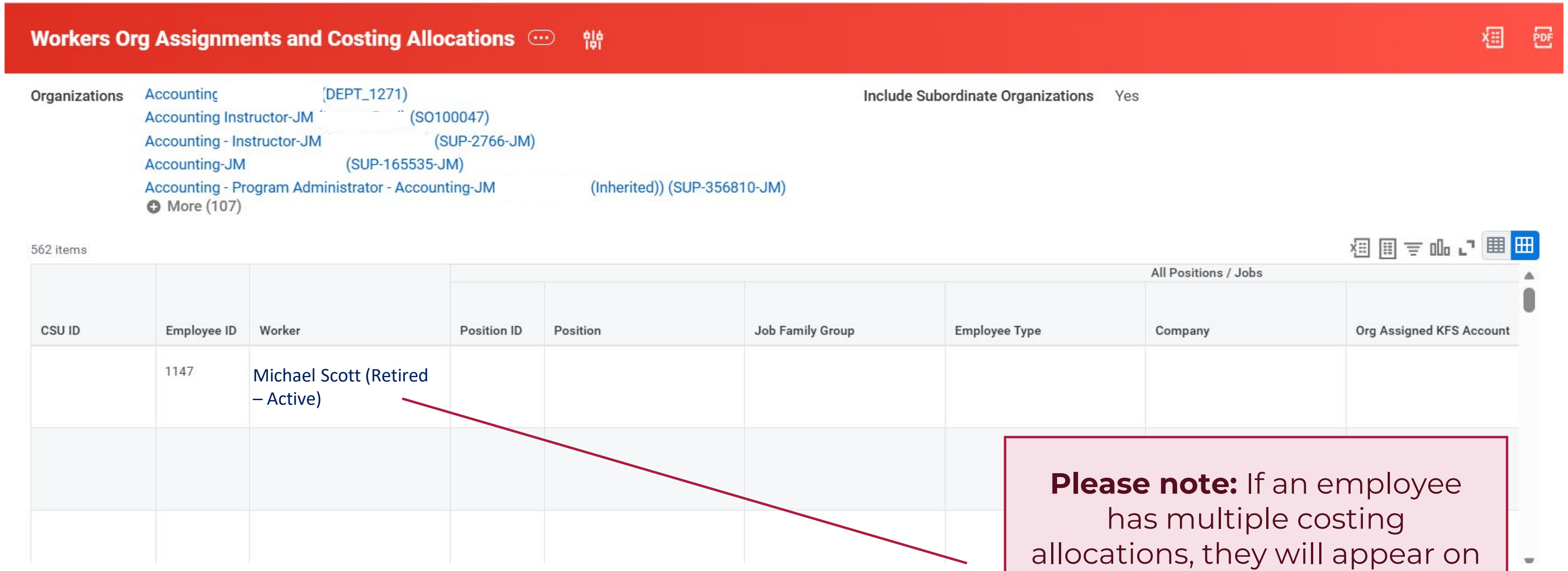
Correct the costing allocation to fix the future; use a PAA only if payroll has already posted incorrectly (fixing the past).

Comparison of Costing Allocations, Org Assignments and PAAs

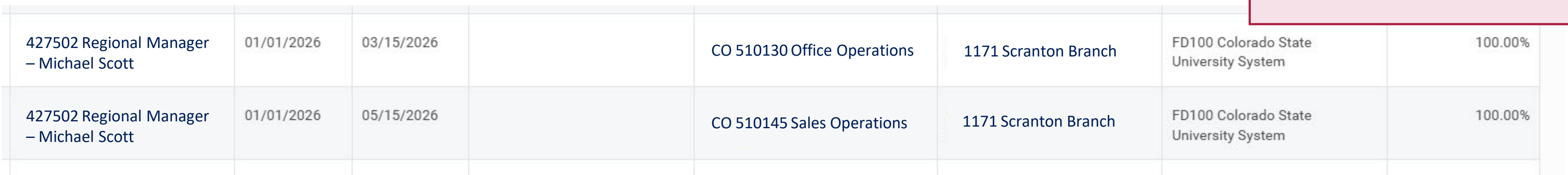
In the issue is…	Use…
Default funding is wrong	Organizational Assignment
Payroll needs to split or post to grants/projects	Costing Allocation
Payroll already posted incorrectly	Payroll Accounting Adjustment (PAA)

Workers Org Assignments and Costing Allocations Report

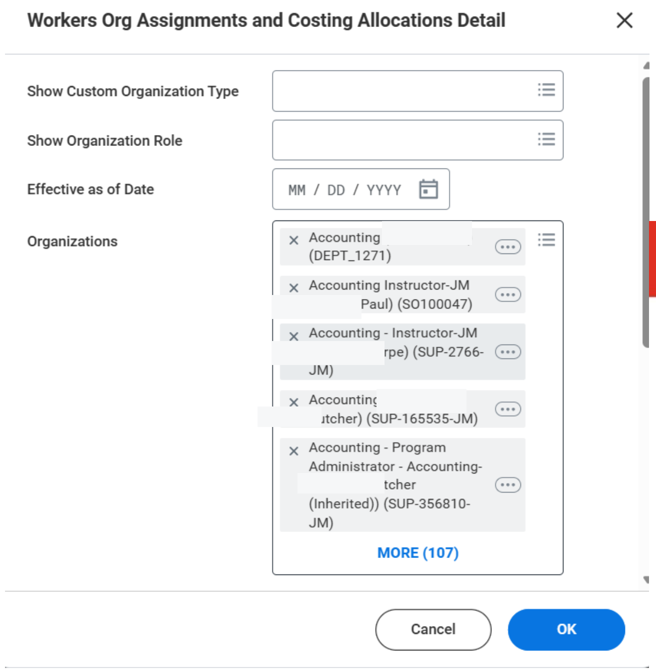


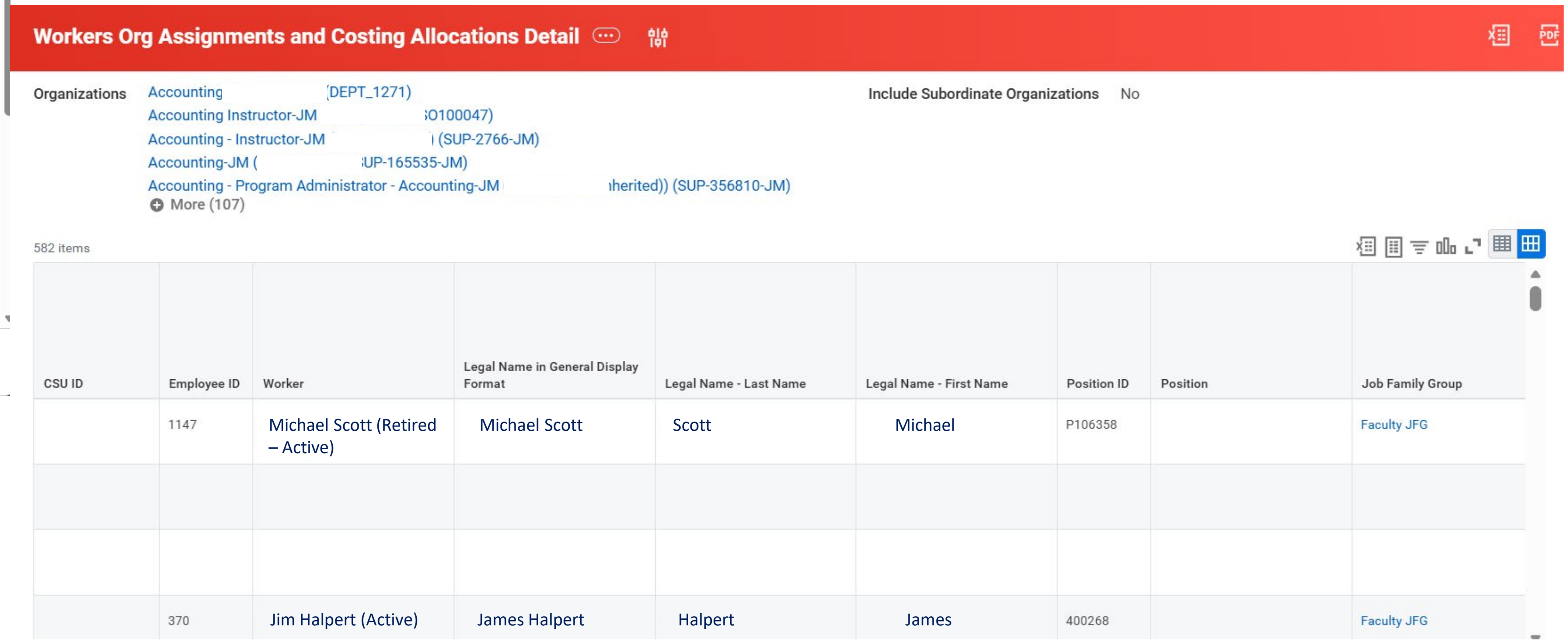


Please note: If an employee has multiple costing allocations, they will appear on multiple lines in the report, as demonstrated by Michael.

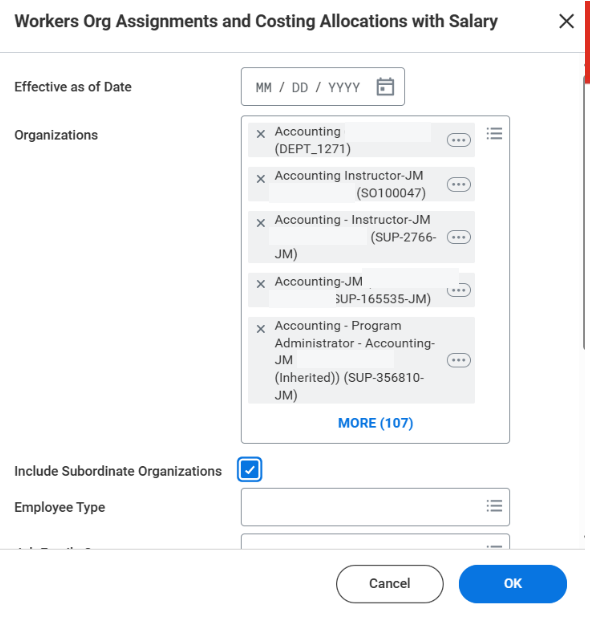


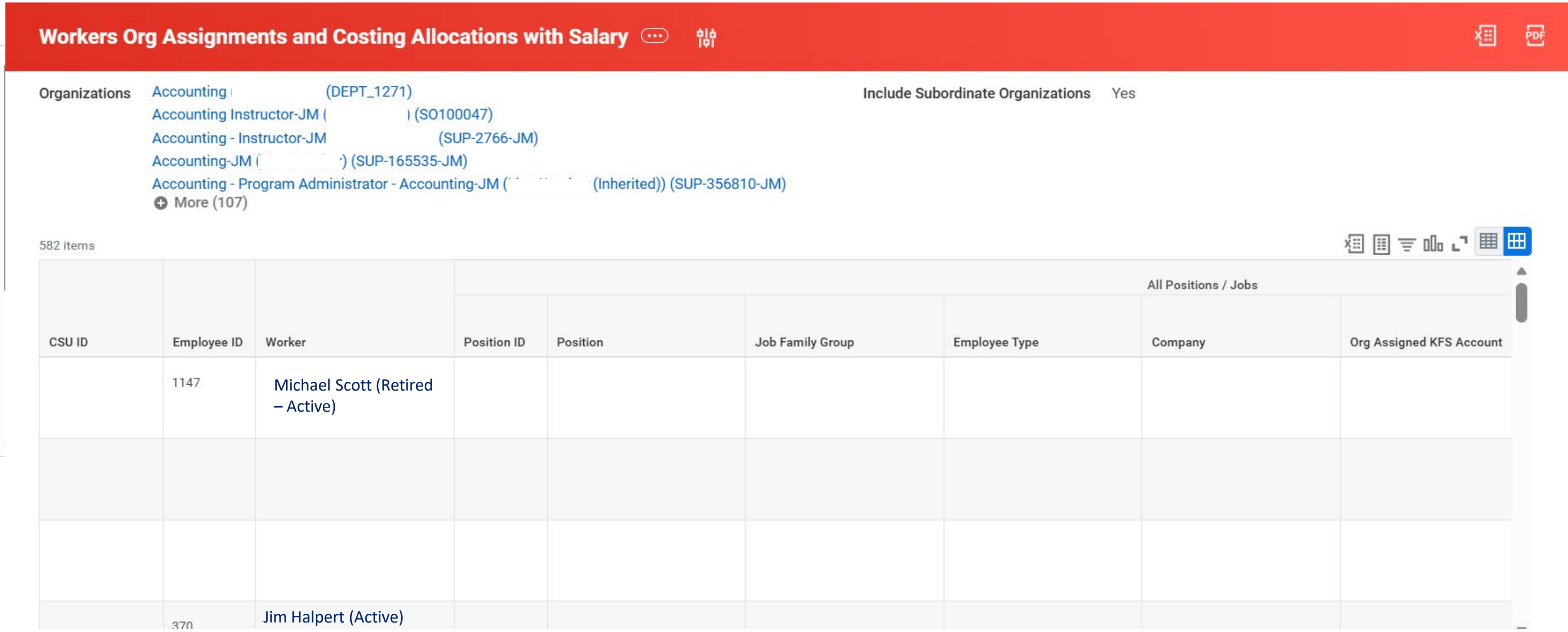
Workers Org Assignments and Costing Allocations Detail Report





Workers Org Assignments and Costing Allocations with Salary Report





The Difference Between WD Costing Allocations Reports

Report	Primary Focus	Employee/ Job Context	Compensation Detail
Workers Org Assignments and Costing Allocations	How pay is distributed across funding sources	Minimal (identifiers only)	Salary amount needed for costing
Workers Org Assignments and Costing Allocations Detail	Full employee, job, and compensation view with costing	Comprehensive (Job, Org, Status, Management)	Full detail (plans, history, ranges, bonuses)
Workers Org Assignments and Costing Allocations with Salary	Current salary with costing	Limited	Current base salary only

Costing Allocations Q&A

- When using a costing allocation for a cell phone allowance where does the dollar amount get entered?
  - *It's part of the compensation plan. Complete either a Job Change or Compensation Change to enter the amount.*
- Is it possible to split an employee's salary across multiple accounts by specific amounts?
  - *Costing allocations are done by percentages only .*

Job Change

What is Job Change in Workday?

A Job Change in Workday allows you to modify, update, change, or edit a job. This process allows for adjustments to various job details, such as:

- Job Profile
- Location Details
- Job Details
- Organizations
- Compensation

Note that changes apply to the current worker in the job but do not affect future hires or other job occupants.

Who Can make Job Changes?

Job Changes can be initiated by:

- HR Partner
- Manager

Job Change Options

- Reasons:
  - Interim Appointment
  - Lateral Move – Different type of job at the same level (not a transfer)
  - Promotion – Higher level job (recruiting process first – job posting
  - Transfer – Changing Sup Orgs or Departments
  - Data Changes – Everything else (FTE, title, work and disbursement periods)

- Job:
  - Position
  - Job Profile
  - Business Title
- Location:
  - Location Details (FTE)
- Details:
  - Job Classifications
  - Administrative
  - Academic

- Organizations:
  - Company
  - Costing
  - Other
- Compensation
  - Total Base Pay
  - Guidelines
  - Salary
  - Hourly
  - Allowance
  - Merit

How Job Change Works

At a high level, the Job Change process includes:

1. Searching for the employee.
2. Selecting the Job Change task.
3. Entering the reason for the change.
4. Completing the necessary fields for the change, Job, Location, Details, Organizations, or Compensation.
5. Submitting the request.

The **Job Change** guide provides detailed steps on how to change job details for an employee.

Important Considerations

- The Data Change > Change Job Details is a good general reason to use when you're changing several items about the job.
- You are not required to make changes to every section. After you complete the necessary changes, you can select the **Summary** tab to review and submit the changes you made.
- For FTE, use the **Schedule Weekly Hours** to enter the hours. If the employee is salaried, you may need to update their salary in the Compensation section of this action.
- Only complete the **Academic** section (Details tab) for roles that are eligible for a 9-month work period under the academic pay plan. For example, faculty, graduate assistants, and AP roles on a 9-month schedule. **IMPORTANT:** This step needs to be completed for these roles to get paid.
- Consider if there are any costing allocations that need to be updated after the job change.

Job Change Q&A

- We need to increase employee's FTE effective 06/01/26 using the job change action, but WD is not allowing the eff date due to 07/01/26 actions in the system. Is there an override SOP for this?
  - *Enter a Workday help case for a temporary resend.*
- Could you please go through a scenario where the FTE is changed from full-time to part-time - maybe something like going from 40 hours per week to 30 hours per week. Show each step from start to submit please.
  - *Demo completed – see recording*
- More unique scenario: We have a 12-mo Faculty Dept. Chair moving to 50% Faculty and 50% AP Associate Dean position. The employee applied for the AP appointment through a job requisition, and we used the Add Additional Job BP to add the AP appointment. Since the employee will be eligible for annual leave in the new AP appointment, will there be a "leave transfer" request during this 'Add Job' process, or will it need to be done manually by someone in a Central HR unit? Essentially, we are unsure if Workday will 'see' or consider the leave balances since we are adding a new job. It may only do that for the Change Job BP?
  - *Your leave eligibility is determined each month by looking at you as an overall worker. So, if your eligibility remains, then you would retain those balances, you would retain those accruals no matter how the change happened.*

Period Activity Pay

What is Period Activity Pay?

Period Activity Pay (PAP) is a way to compensate an employee with a lump-sum amount that is paid out over a defined period, rather than as a single payment or a permanent salary change.

It is administered outside of the employee’s regular compensation package and is processed using the Manage Period Activity Pay Assignments business process in Workday.

Why Period Activity Pay Matters

Period Activity Pay is typically used when compensation:

- Covers work performed over a specific period
- Should be spread across multiple pay cycles
- Should not change base salary

Common, explicitly listed examples include:

- Adjunct instruction
- Transitional Faculty Instruction
- Supplemental or temporary pay
- Graduate assistant assignments
- Temporary academic or instructional appointments

Note: Period Activity Pay can be a stand-alone process or included as part of the Hire or Add Additional Job business processes. When PAP is used during Hire or Add Job the proposed Compensation subprocess should not include salary values, unless PAP is in addition to a regular salary.

Who Can Initiate or Manage Period Activity Pay

PAP actions can be initiated or corrected by:

- HR Partners
- Compensation Partner
- Business Officers

How the Period Activity Pay Process Works

When a Period Activity Pay assignment is created:

- A total amount for the entire period is entered.
- Workday automatically distributes that amount evenly across the pay periods covered by the assignment, unless customized.
- Payments align to the organization's existing payroll cycle.

The **Period Activity Pay** guide provides detailed steps on how to request a period activity pay.

Note: Once submitted, the request automatically routes for approval based on Workday's business process design and organizational structure. Approval routing may include multiple roles, such as:

- Compensation Partner
- Business Officer

Important Considerations

Period Activity Pay tracks two important date types:

Activity Dates

- Represents when the work is performed

Payment Dates

- Represent when pay is issued
- Default to the activity date range, but can be adjusted if needed

Note: A Period Activity Pay should be submitted prior to the start of the work assignment.

Costing and Funding:

- KFS Account must be added when the PAP is initiated.
- Costing can be spilt across multiple accounts.

Corrections to Period Activity Pay

Period Activity Pay can be corrected under specific conditions:

- Only the most recent PAP transaction can be corrected. **Note:** The Compensation Administrator can cancel previous PAPs.
- Corrections cannot occur when a PAP approval process is in progress.
- PAP amounts that have already been paid cannot be adjusted.

Allowed corrections include:

- Dates
- Hours
- Pay amounts
- Costing Allocations

The following guides provides detailed steps on how to correct or cancel a period activity pay.

Adjust Period Activity Pay Assignments

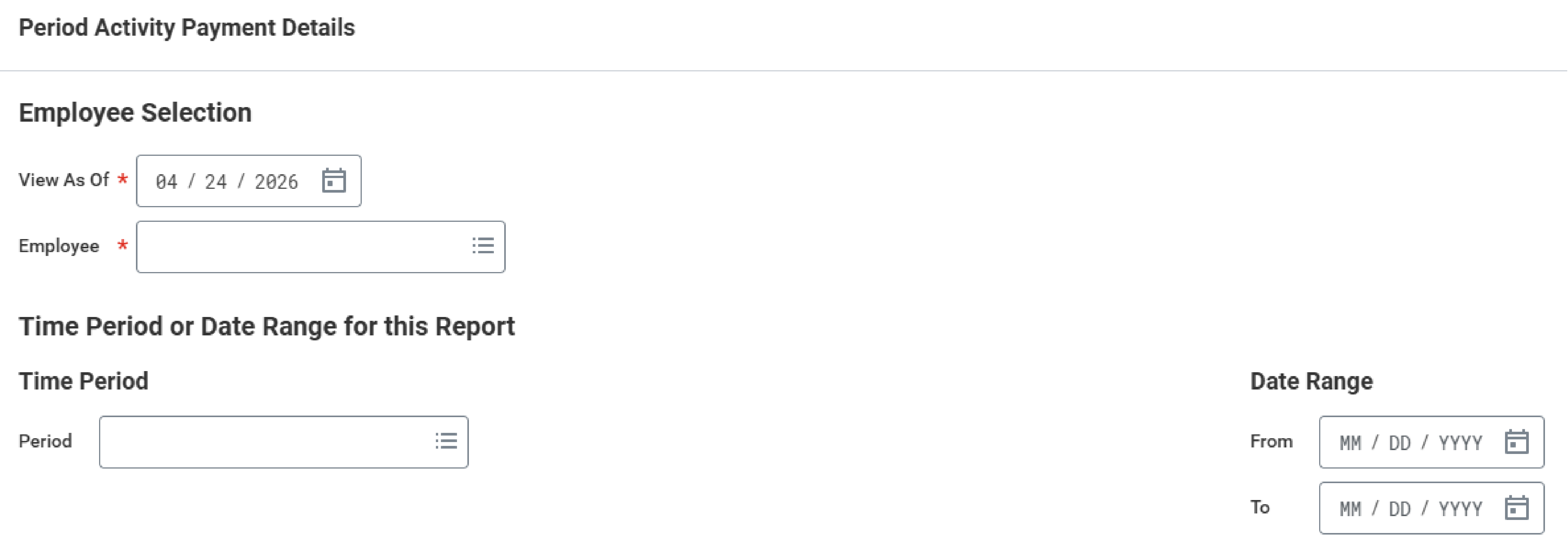
Cancel Period Activity Pay Assignments

Important considerations for canceling a PAP:

- If the rest of the pay **should** be paid out, select **Finish Payments**. If the payments **do not** need to be paid out, select **Forfeit Payments**.
- This does NOT end the payments automatically, you also needs to change the **End Date**, the **Work Hours** for the Activity Period, the **Total Amount**, and then edit the **Customize Payments** section to remove the remaining payments.

Period Activity Payment Details Report

The Period Activity Payment Details Report provides the payment activity for the selected employee.



Period Activity Payment Details

Employee Selection

View As Of * 04 / 24 / 2026

Employee *

Time Period or Date Range for this Report

Time Period

Period

Date Range

From MM / DD / YYYY

To MM / DD / YYYY

Period Activity Pay Q&A

- Can PAAs be used to move some of a Period Activity Pay to a different account? At what point in the PAP can we enter a PAA? ie. PAP is for all of summer, some hours from May need to be adjusted.
  - As soon as payroll is run for May you can create a PAA to adjust; if not, you can edit the PAP for the unrun amounts.

Move Worker / Transfer

What is Move Worker and Transfer in Workday?

Move Workers: Use when the initiator **does** have access to the employee's current supervisory organization.

Note: If Subordinates need to move then use the Job Change task (move subordinates with message option)

Request Transfer: Use when the initiator needs to move an employee from a supervisory organization that they do not support into one they do.

Who Can Initiate a Move Worker or Transfer?

Move Worker and Transfer can be initiated by:

- HR Partner
- Manager

How the Move Worker Process Works

At a high level, the Move Worker process includes:

1. Searching for the Move Workers task.
2. Selecting the Effective Date and Supervisory Organization.
3. Selecting the Proposed Supervisory Organization.
4. Submitting the request.

The **Move Worker or Multiple Worker** guide provides detailed steps on how to move an employee from one manager to another within the Supervisory Organization that you are assigned.

Note: Use this process if you have access to the employee's current sup org.

How the Request Transfer Works

At a high level, the Request Transfer process includes:

1. Searching for the Request Transfer task.
2. Selecting the Worker (employee).
3. Completing the necessary fields.
4. Submitting the request.

The **Request Transfer** guide provides detailed steps on how to transfer an employee to a new supervisor in Workday.

Note: You'll use this process to move an employee from a supervisory organization that you do not support into one you do.

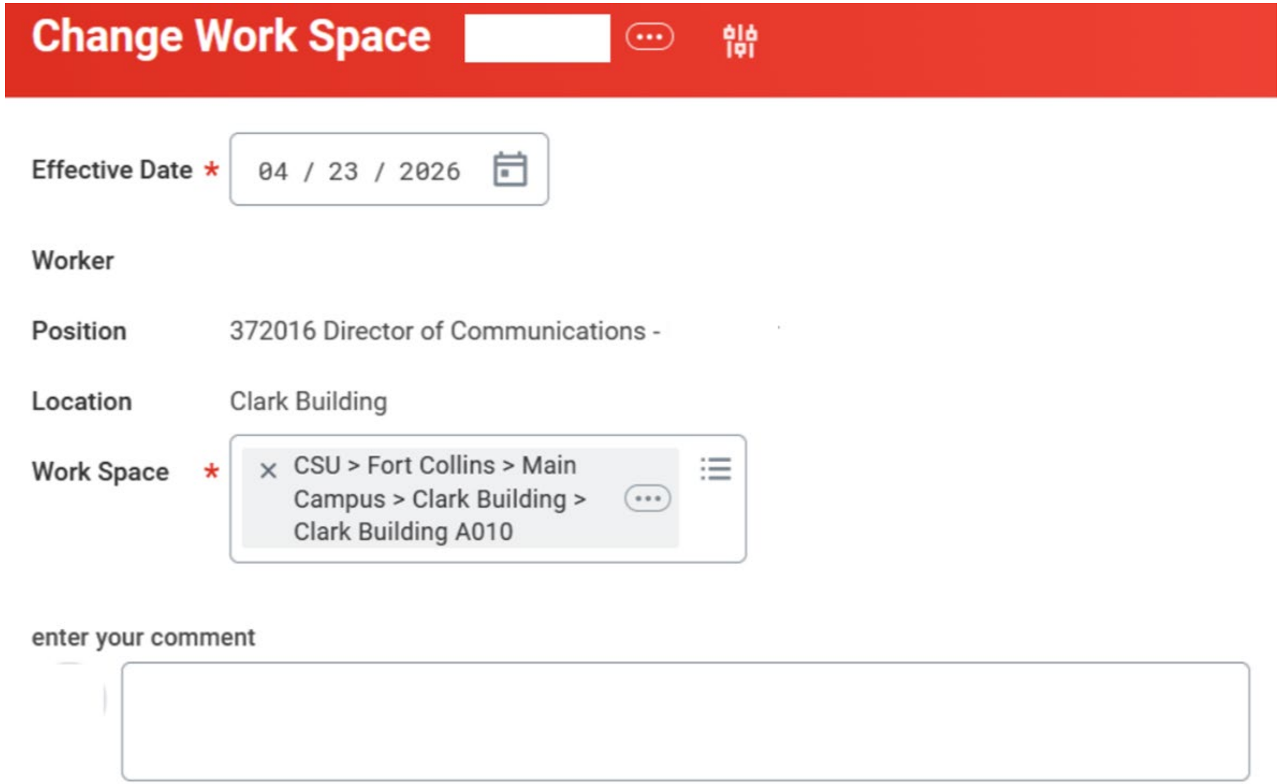
For Pueblo, use the Personal Action Form to update the Supervisor.

Important Considerations

- When transferring an employee, and they are moving to a supervisor on a **different team**, answer the following questions:
  - **What do you want to do with the opening left on your team?**
  - **Is this position available for overlap?**
- The Sup Org needs to be the same type, for example, Job Managed (JM) to JM and Position Managed (PM) to PM.
- For PM, if you are **NOT** moving the position with the worker, you must have an open position in the other Sup Org that you are moving them to.
- For the Request Transfer process, the Manager of the employee's **current** sup org makes the position backfill decision determining whether the employee is transferred with their position or not. HR Partners should communicate with these Managers to ensure that they answer this question as expected before approving the action or it can get stuck without a position to move the employee into.

Change Work Space

- Run the **Change Work Space** task to update an employee's specific office within their current location.
- If the office or room does not exist, create a Help case to request its creation.



Move, Transfer, Change Workspace Q&A

- I have tried to do the Change Workspace with a few of my GRA students, but the only option that comes up in the Workspace field is "No items".
  - *That location may not have workspaces – enter a Help case to create the workspace.*

Organizational Assignments

What are Organizational Assignments?

Organizational Assignments determine where a worker sits in the organization and how their payroll costs are charged.

This is where the default KFS account and department are set.

Who Can Change an Organization Assignment?

Business Officers

Finance Partners

HR Partners

High-level Organizational Assignments Process

The high-level process to update an organizational assignment includes:

- Selecting the employee
- Choosing an effective date
- Updating one or more organization values
- Submitting the change for approval

The request then routes to the appropriate reviewer based on security and business rules.

The **Change Organization Assignments** guide provides steps on how to change an organization assignment in Workday.

Change Organization Assignments Process End to End

HR Partner:

Initiates 'Change Organization Assignments' Task

Process is Complete IF HR Partner Initiates Process

What Organizational Assignments are *NOT*

Organizational Assignments:

- ✕ Do **NOT** change an employee’s job or position.
- ✕ Do **NOT** change their base pay.
- ✕ Do **NOT** replace PAAs for historical corrections.

Employee Assigned Organizations Report

The **Employee Assigned Organizations** Report lists all CSU employees, along with their employee IDs and assigned organizations.

Employees Assigned Organizations

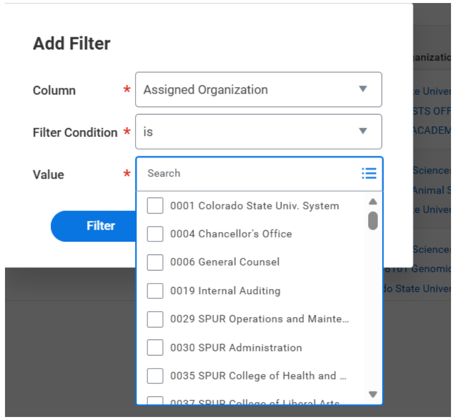
20184 items

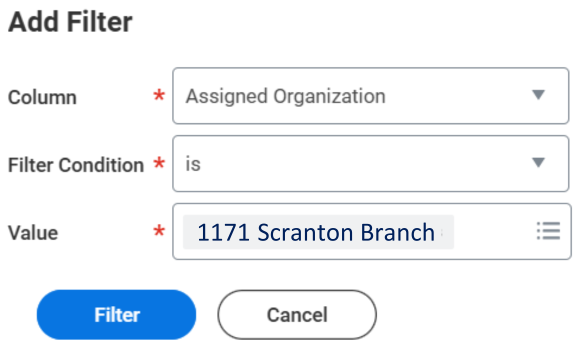
Employee ID	Employee	Assigned Organization
202166	Michael Scott (Retired – Active)	Dunder Mifflin Paper Company 1171 Scranton Branch CO 510130 Office Operations
10029	Leslie Knope (Retired – Active)	City of Pawnee 2435 Parks & Recreation CO 540215 Community Programs
10038	Ted Lasso (Active)	AFC Richmond Football Club 7430 Coaching Department CO 590425 Player Development

Items per page All 1-20184 of 20184 items

Note: To narrow the results further, review the next slide.

Employee Assigned Organizations Report, Continued





Employees Assigned Organizations

38 of 20184 items

Employee ID	Employee	Assigned Organization
73	Michael Scott (Retired – Active)	Dunder Mifflin Paper Company 1171 Scranton Branch CO 510130 Office Operations
103742	Jim Halpert (Active)	Dunder Mifflin Paper Company 1171 Scranton Branch CO 510145 Sales Operations
109647	Pam Beesly (Active)	Dunder Mifflin Paper Company 1171 Scranton Branch CO 51050 Administrative Support

Items per page All 1-38 of 38 items

Troubleshooting and Problem Solving

If the issue is…	Use…
Wrong financial org	Organizational Assignment
Wrong labor split	Costing Allocation
Payroll already posted incorrectly	Payroll Accounting Adjustment

Add Job

What is an Add Job in Workday?

The Add Job task allows you to assign an additional job to an employee.

This is typically used for:

- Students or non-student hourly with multiple jobs.
- Students or non-student hourly that should be paid on different accounts for different work (like projects in time clock plus).

Who Can Add Job?

Add Job can be initiated by:

- HR Partner
- Manager

How Add Job Works

At a high level, the Add Job process includes:

1. Searching for the employee.
2. Selecting the Add Job task.
3. Selecting the Supervisory Organization.
4. Entering the Effective Date and Reason.
5. Completing the Job Details.
6. Submitting the request.

The **Add Job** guide provides detailed steps on how to add an additional job for an employee.

Important Considerations

- If an employee has a job and is getting an additional job, the job goes through the posting and recruitment process first, then the Add Additional Job task initiates (after ready to hire).
- Exceptions to recruitment requirement:
  - The Add Additional Job task can be used without the recruitment process for additional jobs that are in the same Sup Org at the same pay rate but just have different costing allocations for different work performed.
  - The Add Additional Job task can also be used to create additional Graduate Assistant jobs, since they don't go through the recruiting process. **Note:** the Graduate School will only approve Graduate Assistant jobs that are 25% or 50% FTE. For other additional job circumstances, Graduate Assistants can be given additional Student jobs.

Add Job Q&A

- When a current student employee applies to a new job through Workday, should we move them through all the workflow stages through the Job Requisition, or just separately add a job for them?
    - *Move through the job requisition stages all the way to Ready for Hire and then select Add Job or Change Current Job (add job in most cases).*

Start Disciplinary Plan / Start Performance Improvement Plan

What are Disciplinary & Performance Improvement Plan in Workday?

Disciplinary and performance improvement plans are completed outside of Workday.

After the communication and documentation is completed for a disciplinary or performance improvement plan, the document is uploaded to Workday.

Who Can initiate Disciplinary & Performance Improvement Plans?

Managers need to work with the HR Partner to complete a disciplinary or performance improvement plan.

Managers can initiate and upload the document to Workday.

HR Partner reviews and approves the disciplinary or performance improvement plan documents in Workday. **Note:** If the HR Partner initiates and uploads the document to Workday, it's automatically approved.

How Disciplinary & Performance Improvement Plans Work

- Start by using the **Employee Relations page on the Human Resources** site to contact the HR Business Partner
- Communicate with employee and complete plan
- Upload document to Workday

The **Start Disciplinary Plan** guide provides detailed steps on how to start the disciplinary plan.

The **Start Performance Improvement Plan** guide provides detailed steps on how to start the disciplinary plan.

Performance Q&A

- Can you further clarify the difference between a performance improvement plan corrective action, disciplinary action and/or letter of expectations? and when each one is relevant? Also, if all can potentially be used for all the employee types listed (faculty/ap/sc). Also, if the manager is uploading this type of document, does the SHRBP have a required task approval role in submissions or only the HR Partner?
  - *PIP/Disciplinary Actions in Workday will be restricted to the options available to the employee group once an employee is selected. If a manager uploads the document, it routes to only the HR partner. If you are unfamiliar with the different types, it is recommended that you talk with your embedded HR lead and/or Senior HRBP.*
- Should HR Partners be uploading Letter of Expectations or Corrective Actions that are on file that were created prior to 1/1/26?
  - *Only letters/corrective actions/discipline 1/1/26 and after should be uploaded at this time.*

Contingent Worker: Contract and End Contract

What are Contingent Workers in Workday?

Contingent Workers in Workday are individuals who perform services for the organization but are not employees. This includes roles such as affiliates, contractors, and other non-paid or externally paid workers. Contingent workers are tracked in Workday to provide appropriate system access, establish organizational relationships, and support compliance and reporting needs, but they are not paid through payroll and do not receive employee benefits.

To create a contingent worker in Workday, the **Contract Contingent Worker** business process is used. This process captures key details such as the individual's role, supervisory organization, and contract dates, and routes for the necessary approvals before establishing the contingent worker record in the system.

Who Can manage Contingent Workers?

In Workday, contingent workers can be managed by any individual who has a Job Managed (JM) supervisory organization.

Because contingent workers do not require positions, they must be hired into a JM sup org. As a result, any manager with a JM sup org can oversee contingent workers, regardless of their employee group, if the appropriate supervisory structure is in place.

How Contingent Workers Work

At a high level, the Contingent Workers process includes:

1. Searching for the Contract Contingent Worker task.
   - Note: If the employee doesn't exist in the system, complete the Create Request task to get them added (**Contingent Worker Pre-Hire**).
2. Selecting the Supervisory Organization.
3. Entering the Start Date and Reason.
4. Completing the Scheduled Weekly Hours.
5. Submitting the request.

The **Contract a Contingent Worker** guide provides detailed steps on how to contract a contingent worker.

You can also make changes to the details of a contingent worker or convert a contingent worker to an employee:

Change Contingent Worker Details

Convert Contingent Worker to Employee

Important Considerations

- When contracting a contingent worker, **always search for an existing Pre-Hire or prior worker record first**. Do not create a new pre-hire if one already exists, as **duplicate records** are difficult to merge and can delay the process.
  - If they do **not** exist in the system, complete the **Create Request** task.
- **All contingent workers route through the background check step.** Ensure the **Background Check Selection questionnaire** is completed accurately before moving forward. Either the **HR Partner or Manager** can complete this step.
- When initiating the **Contract Contingent Worker** process, the HR Partner must provide key details including **name, date of birth, citizenship, and email address**.
- While optional, providing a **home address** is strongly recommended, as it can help expedite **NetID creation and system access**.
- Contingent workers must be hired into a **Job Managed (JM) supervisory organization**. They do **not require a position** and cannot be hired into **Position Managed (PM) sup orgs**.
- **Start and end dates are required** for contingent workers and should be entered carefully, as access will end based on the end date.
- Contingent workers are **not paid through Workday payroll** and do **not receive employee benefits**. Their record is used for **tracking, access, and compliance** purposes.
- **System access should be reviewed carefully.** Ensure contingent workers are granted **only the minimum access needed** for their role.
- If a contingent worker later becomes an employee, they must be **converted by applying to a job requisition** and should apply through the **external career site**, not the internal career site.

Contingent Worker Q&A

- I am unclear if our existing contingent workers who transitioned from Oracle to workday would be automatically listed under a JM sup org can you clarify?
  - *Yes, they were brought into Workday as a contingent worker (JM) – primary only .*
- Is a manager no longer able to contract a contingent worker?
  - *Only the HR Partner because of the Pre-Hire step (gender and date of birth can't be completed by everyone).*
- Do all contingent workers receive a netID? If so, are departments being charged for these netID's? What steps should an HR partner take when a netID is not needed and therefore the division/dept does not want to be charged for this unnecessary expense?
  - *Yes, they all do receive a NetID and the department will be charged.*

Contingent Worker Q&A, continued

- Contingent workers appear to receive notifications about their netID and these notifications tell the contingent worker to log into Workday to complete hiring forms. This has resulted in numerous additional steps for HR Partners to explain that they do not have hiring forms. Is there an avenue for this to be removed from the contingent worker process to eliminate confusion?
  - *They do have basic onboarding steps – may need to clarify the wording.*
- Will the HR Partner be notified in Workday when a contingent worker is approved (e.g., background check)?
  - *There is a notification sent to the Manager, may need to add the HR Partner.*

One –Time Payments

What is a One-Time Payment in Workday?

A One-Time Payment is a single, non-recurring payment made to an employee outside of their regular salary or wages. It is processed in Workday using the Request One-Time Payment business process.

Examples explicitly listed include:

- Award Payment
- Supplemental Pay
- Relocation
- Retention Bonus
- Apparel

Note: *One-Time are NOT used for correcting regular pay. Pay corrections are handled through retroactive pay or off-cycle payments, NOT the One-Time Payments process.*

Who Can Initiate a One-Time Payment?

Depending on the organization and security setup, a One-Time can be initiated by:

- Managers (for their direct reports only)
- HR Partners
- Compensation Partners
- Business Officer (when the request originates at the college or division level)

Note: *If a Business Officer initiates a One-Time Payment, it will route to the Compensation Partner for approval.*

How the One-Time Payment Process Works

At a high level, the Request One-Time Payment process includes:

1. Selecting the employee and effective date.
2. Choosing a reason and One-Time Payment Plan.
3. Entering the amount and scheduled payment date.
4. Confirming or updating costing/funding information.
5. Submitting the request for approvals.

The **Request One-Time Payments** guide provides detailed steps on how to request a one-time payment.

Note: Once submitted, the request automatically routes for approval based on Workday's business process design and organizational structure. Approval routing may include multiple roles, such as:

- Compensation Partner
- Business Officer

Important Considerations

Costing and Funding:

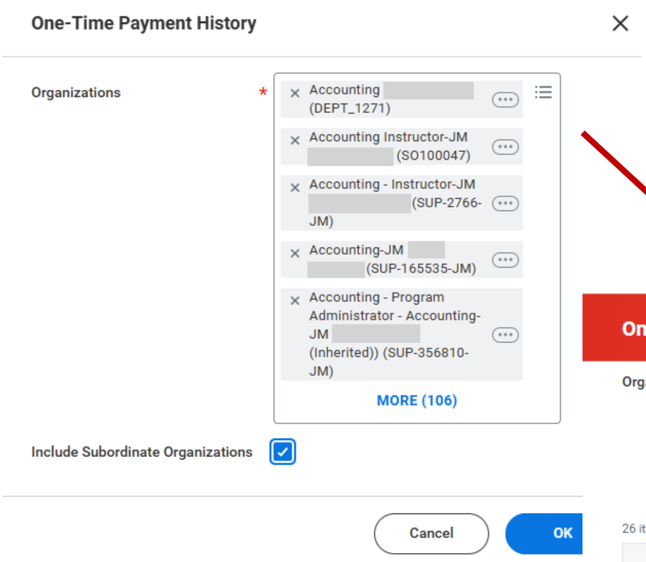
- Costing information defaults from the employee's current assignment.
- The funding source may need to be updated if the payment is charged elsewhere.
- Business Officers or Finance reviewers often validate this information.

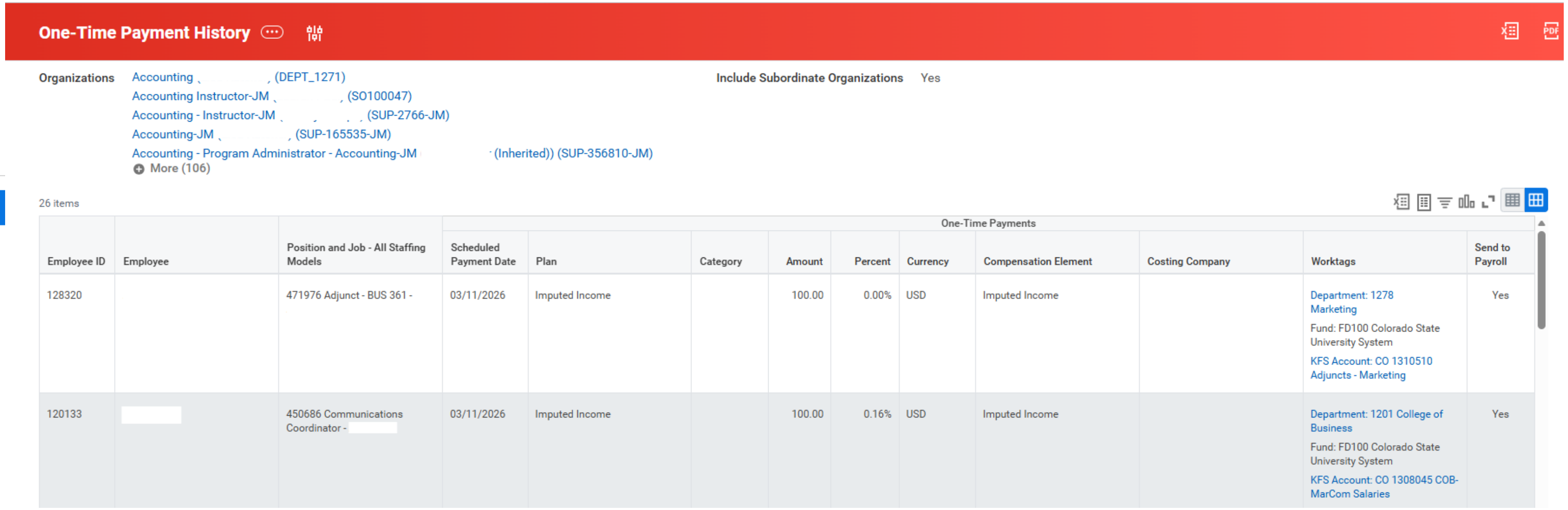
Timing:

- The **Scheduled Payment Date** is **NOT** the paycheck date.
    - Workday uses this date to determine **which pay period** the payment falls into.
    - The employee is then paid on the **normal pay date for that pay period**.

One-Time Payment History Report

The **One-Time Payment History** Report provides a list of all the employees with a one-time payment for the selected organizations.





One-Time Payment History

Organizations: Accounting , (DEPT_1271); Accounting Instructor-JM , (SO100047); Accounting - Instructor-JM , (SUP-2766-JM); Accounting-JM , (SUP-165535-JM); Accounting - Program Administrator - Accounting-JM (Inherited)) (SUP-356810-JM); More (106)

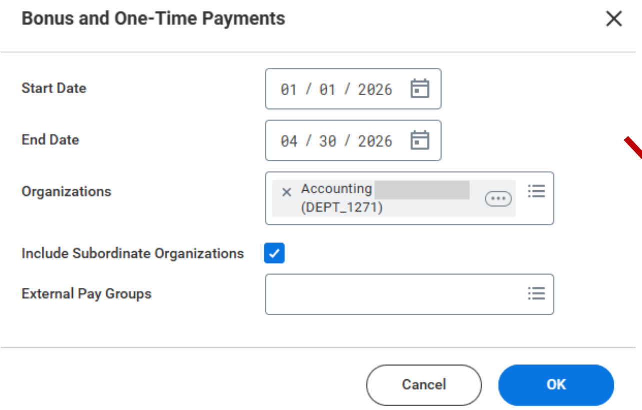
Include Subordinate Organizations: Yes

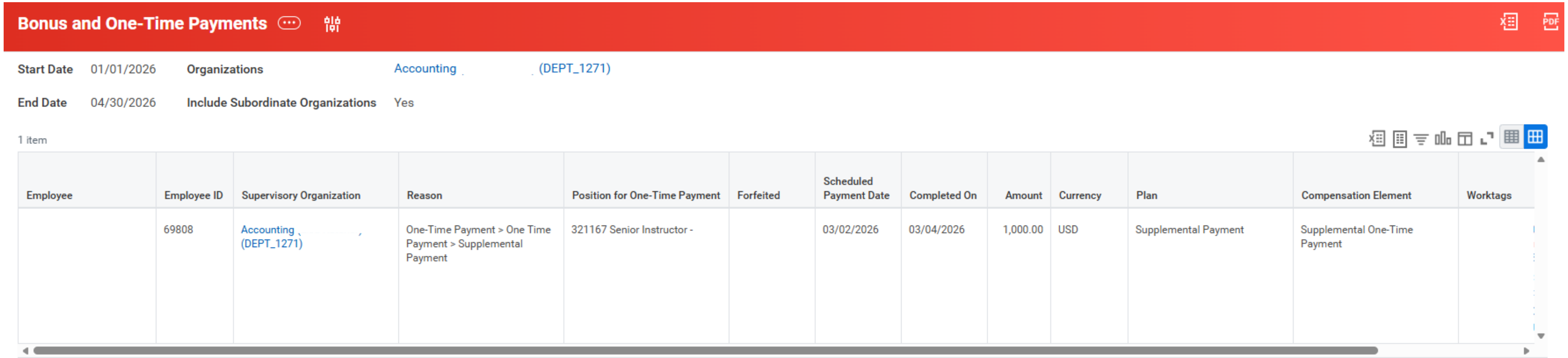
26 items

			One-Time Payments									
Employee ID	Employee	Position and Job - All Staffing Models	Scheduled Payment Date	Plan	Category	Amount	Percent	Currency	Compensation Element	Costing Company	Worktags	Send to Payroll
128320		471976 Adjunct - BUS 361 -	03/11/2026	Imputed Income		100.00	0.00%	USD	Imputed Income		Department: 1278 Marketing Fund: FD100 Colorado State University System KFS Account: CO 1310510 Adjuncts - Marketing	Yes
120133		450686 Communications Coordinator -	03/11/2026	Imputed Income		100.00	0.16%	USD	Imputed Income		Department: 1201 College of Business Fund: FD100 Colorado State University System KFS Account: CO 1308045 COB-MarCom Salaries	Yes

Bonus and One-Time Payments Report

The **Bonus and One-Time Payments** Report provides a list of all the employees with a bonus and one-time payment for the selected organization(s).





Employee	Employee ID	Supervisory Organization	Reason	Position for One-Time Payment	Forfeited	Scheduled Payment Date	Completed On	Amount	Currency	Plan	Compensation Element	Worktags
	69808	Accounting (DEPT_1271)	One-Time Payment > One Time Payment > Supplemental Payment	321167 Senior Instructor -		03/02/2026	03/04/2026	1,000.00	USD	Supplemental Payment	Supplemental One-Time Payment	

One-Time Payment Q&A

- When submitting One-Time Payments, the reason must be entered twice, once in the summary and again in the payment plan. Since dollar amounts automatically populate the summary, could the reason also auto-populate to avoid redundancy?
    - *Will check – but really one is the overall reason and then another for the payment.*

Compensation Change

What is a Compensation Change in Workday?

A compensation Change in Workday is used to update an employee’s base pay or other salary-related compensation elements without changing their position, job profile, or other employment details. This is handled through the Request Compensation Change business process.

Compensation Changes are distinct from:

- One-Time Payments (single lump-sum payments)
- Period Activity Pay (pay spread over a defined period)
- Job Changes (which may also trigger compensation updates)

When Compensation Changes Are Used

Compensation Changes are used whenever an employee’s ongoing pay needs to be modified, such as:

- Base salary increases or decreases
- Equity or market adjustments to base pay
- Retention adjustments to base pay

Any modifications to pay – **outside of a job or position change** – should start with the Request Compensation Change process. **Note:** Use the Job Change process if it impacts the FTE.

Who Can Initiate a Compensation Change

Compensation Changes can be initiated by:

- HR Partners
- Compensation Partners
- Business Officers (particularly when changes originate at the college or division level)

High-Level Compensation Change Process

At a high level, the Request Compensation Change process includes:

1. Employee & Effective Date
   - The effective date typically defaults to the start of the next pay period, though it can be adjusted
2. Reason for Change
   - The reason drives approval routing and downstream processing
3. Compensation Fields
   - Salary amount, amount change, or percentage change
   - Supporting comments and documentation may be required
4. Submit for Approval

The **Request a Compensation Change** guide provides detailed steps on how to request a compensation change.

Once submitted, the request automatically routes for approval based on Workday's business process design and organizational structure. Approval routing may include multiple roles, such as:

- Compensation Partner
- Business Officer
- Classification and Compensation
- Manager or Manger's Manager (Notification only)
- Employee acknowledgment (require for certain reasons such as equity or retention)

Note: The exact routing depends on the change reason, employee type (staff vs. Faculty), and organizational and finance rules.

Important Considerations

Things to be mindful of when Requesting Compensation Changes:

- Do **NOT** change compensation plan assignments during a Request Compensation Change, Plan assignments should only be updated through a Job Change, Incorrect plan changes may result in an employee not being paid.
- Compensation changes affect ongoing base pay, not single payments or temporary assignments.

There are two main salary plans:

- The CSU Salary Plan – offered for 12 months
- CSU Academic Plan – offers either a 9-month or 12-month option.

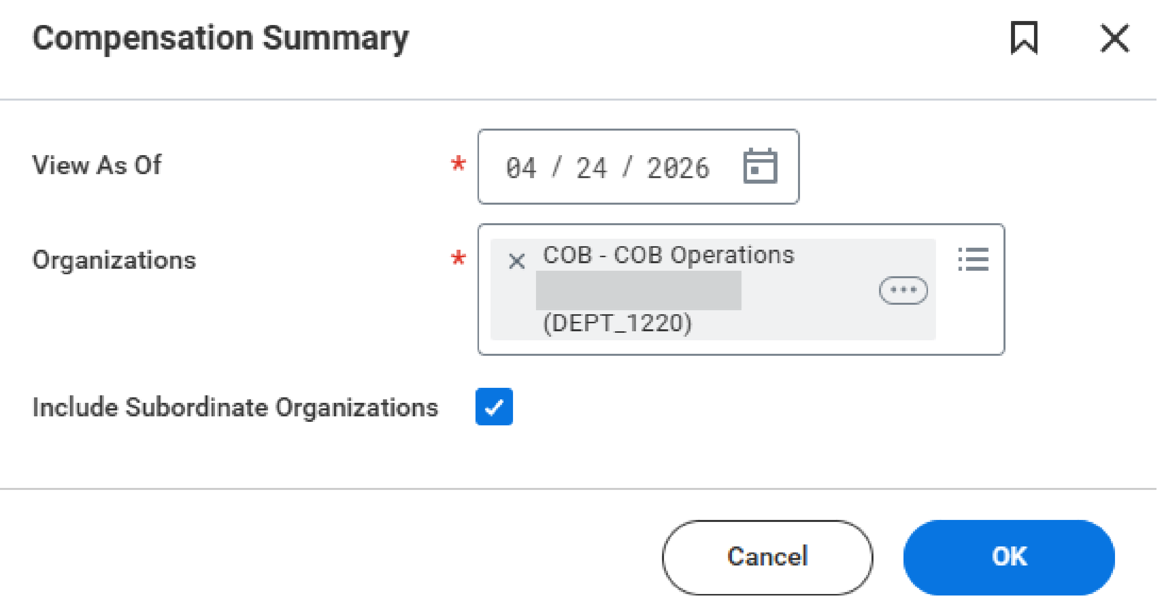
***Note**: For Academic Plans, you must select both the Annual work period and the Disbursement plan.*

Compensation Changes vs. Other Pay Actions

Use this when…	Use this process
Updating ongoing salary and allowances	Request Compensation Change
Paying a bonus or award	One-Time Payment
Paying work over a defined time period	Period Activity Pay
Changing role, position, FTE or job	Job Change (with Proposed Compensation)

Compensation Summary Report

The **Compensation Summary** report provides a list of employees' positions and base pay based on the selected organizations.



Compensation Summary Report, continued

To view a list of employees with their positions and total base pay, select the number in the Employee Positions in the Employee Positions column for the desired organization.

Compensation Summary

View As Of	04/24/2026
Organizations	COB - COB Operations (DEPT_1220)
Include Subordinate Organizations	Yes

Compensation Summary 15 items

Organization	Employee Positions	Total Salary & Allowances	Total Base Pay	Average Base Pay	Default Currency	Frequency	Average Compa-Ratio	Average Pay Range Penetration
COB - COB Operations (DEPT_1220)	3	.00	.00	.67	USD	Annual	0	0
COB - COB Operations-JM (SUP-6764-JM)	0	0.00	0.00	0.00	USD	Annual	0	0

3 items

Employee	Position	Total Salary & Allowances	Total Base Pay	Currency	Frequency
	293385 Senior Director of Information Technology	.00	.00	USD	Annual
	372565 Senior Human Resources Manager	00	.00	USD	Annual

Compensation Q&A

- Is this fillable PDF still applicable at all for salary adjustments outside of the annual merit cycle (https://hr.colostate.edu/wp-content/uploads/sites/25/2023/12/offcycle_salary_form.pdf) or does this Workday process replace it all together, given that it was tied to TMS?
  - *Not needed, all routed through Workday.*
- Will you please review the entire process for out of cycle base salary merit increases for HR Partners (e.g., is the out of cycle merit increase form still used)?
  - *The Out of Cycle Base Salary Merit Increase form is not needed, as all steps are completed through Workday.*
- Does the compensation change apply to hourly employees when changing their hourly rate. Or should this action be completed by "job change details"?
  - *Either way works, suggest if only making changes to the compensation use Request Compensation Change, but if making other changes use the Job Charge task.*
- Is there a job aid for the employees to view their compensation who were eligible/received a SALX raise July 1? Is there a standard report for the manager to download all their direct reports for this same SALX data (name, current salary, proposed salary for July 1)? Can either see this data before July 1 or only after that date would people see that in the compensation history?
  - *Employees can go the Compensation tab from their Profile to changes after they take effect.*
  - *HR Partners and Compensation Partners can run the Position Compensation as of Effective Date Report.*

Create Position

What is Create Position in Workday?

Create Position in Workday is the process used to establish a new, budgeted role within a Position Managed (PM) supervisory organization before recruiting or hiring can begin.

A position defines the job details, such as job profile, worker type, time type, and reporting structure, and serves as the foundation for creating a job requisition and ultimately hiring into that role. This step ensures proper approvals, position control, and alignment with organizational structure before any recruitment activity takes place.

Who Can Create a Position?

HR Partner

- Can create a position in any supervisory organization they support.

Manager

- Can create a position in their own supervisory organization.
- If a manager creates a position, the position will route to the HR Partner for review and approval before routing to Classification and Compensation for final approval.

How the Create a Position Process Works

At a high level, the Create a Position process includes:

1. Selecting a PM supervisory organization to house the new position
2. Initiating the Creation Process business process and filling in the position details
3. Changing the Organization Assignments – select a KSF Account
4. Submitting the newly created position for review and approval

The **Create a Position** guide provides detailed steps on how to create a new position in Workday.

Note: Once submitted, the request automatically routes to HR Classification and Compensation* to review the position. Once, approved, the position will appear in the manager's Supervisory Organization.

*If the position was created by a Manager, the business process will route to the HR Partner before Classification and Compensation.

Important Considerations

Before creating a new position, determine the type of employee you are hiring. Administrative Professional (AP), Faculty (excluding Adjunct), State Classified, and Postdoctoral Fellow roles require a position and must be created in a Position Managed (PM) supervisory organization before a job requisition and hiring process can begin.

Prior to creating a new position, review existing positions in the supervisory organization to confirm there isn't an available, unfilled position. Use reports such as **CSUS View All Positions** and **PM Job Requisitions** to avoid creating duplicate positions.

Position creation establishes the role structure (job profile, reporting relationship, worker type, etc.), but budget and hiring approval now occurs at the job requisition stage.

Employees hired into Job Managed (JM) supervisory organizations—such as Student Hourlies, Non-Student Hourlies, Graduate Assistants, and Adjuncts—do not require positions. For these groups, proceed directly to **Create Job Requisition** or **Hire Student** (Graduate Assistants only).

Take care when completing the position details, especially the Job Profile and Job Description. These fields drive classification, compensation, and downstream processes. Incomplete or incorrect entries may result in the position being returned for edits by Classification and Compensation (CCA).

Ensure the correct supervisory organization is selected, as this determines reporting structure, security roles, and approval routing. Changes later can be complex and may require additional transactions.

Be mindful of position attributes such as time type (full-time vs. part-time), location, and worker subtype, as these impact benefits eligibility, recruiting setup, and compliance requirements.

Create Position Q&A

- I understand that before creating a position you want to make sure that it is not already existing. How can one do a search for a position?
  - *Run the report View All Positions and then select the sup org in which the position you are searching for, resides.*
- I noticed a qualifications tab while (practice) completing the first part of the form. When would those qualifications questions need to be answered?
  - *CSU does not use the Qualifications tab so this may be ignored. The positions minimum qualifications should be entered into the Job Description field as per step 11 of this guide: https://scribehow.com/o/uS-xsZjVRDWg94vUvVs5FQ/viewer/How_to_Create_a_Position_in_Workday__Fl7KyaxqTpmhT5H5M9tLww.*
- Can you clarify what best practices are for creating/editing position descriptions when we know that there will be overlap between the incumbent and new hire? Should we be creating a second position to fill through the job requisition or using the original position that will eventually be vacated by the incumbent and filled with the new hire?
  - *Best practice is to reuse and modify the existing position rather than create a new position.*
  - *When a position is updated through Edit Position Restrictions, those changes do not automatically apply to the current incumbent. The incumbent remains seated in the original version of the position. As a result, the only way to seat someone into the updated version of the position is through a job requisition and hire process.*
  - *This is the same reason a Promotional Announcement requisition and application are required when modifying a current employee's position and moving them into the updated version. The updated position attributes only take effect once the employee is hired into that modified position.*
  - *Because of this functionality, position reuse works well for scenarios where the current incumbent is leaving, and a replacement will be hired into a modified version of the role.*
  - *Additionally, Workday does support position overlap, so if there is a need for a transition or training period, both the incumbent and new hire can temporarily occupy the position concurrently.*

Edit Position Restrictions

What is Edit Position Restrictions in Workday?

Edit Position Restrictions in Workday is the process used to update the details of an existing position, such as job profile, compensation, title, or key attributes without immediately impacting the current employee in that role. These updates define the future state of the position.

To apply the changes to a current incumbent, a Promotional Announcement (PA) job requisition must be created and completed. If the position is vacant, the updates will carry forward to a future hire through the standard job requisition and hiring process. This approach ensures proper review, approval, and documentation before any changes to job details or compensation take effect.

Who Can Edit Position Restrictions?

HR Partner

- Can create a position in any supervisory organization they support.

Manager

- Can create a position in their own supervisory organization.
- If a manager creates a position, the position will route to the HR Partner for review and approval before routing to Classification and Compensation for final approval.

How the Edit Position Restrictions Process Works

At a high level, the Edit Position Restrictions process includes:

1. Searching for Edit Position Restrictions in the Workday search bar
2. Selecting the position that needs modifications/changes
3. Select the reason and make the necessary edits.
4. Submit the request.

The **Edit Position Restrictions** guide provides detailed steps on how to edit position restrictions in Workday, specifically for edits to a filled position, but those changes are only in preparation for either a recruitment or a promotion that results into a promotional posting.

Important Considerations

- Updates made through **Edit Position Restrictions** define the future state of the position and do **not** immediately impact the current incumbent.
- To apply changes to a current employee, a **Promotional Announcement (PA) job requisition** must be created and completed. The incumbent must apply and be moved through the process to “Ready for Hire” for updates (e.g., title, compensation, duties) to take effect.
- If the position is vacant, the updated details will carry forward to the next hire through the standard job requisition and hiring process.
- Changes will not take effect until a job requisition is created and completed for the position. Simply editing the position does not update the worker record.
- Many fields and the approval workflow mirror the **Create Position** process, including review by Classification and Compensation (CCA) where applicable.
- Set the **Availability Date** carefully. This should typically be today’s date. If a future date is selected, you will not be able to create a job requisition for the position until that date is reached.
- Be mindful of which fields you are updating (e.g., Job Profile, Worker Sub-Type, title), as these drive downstream impacts such as pay, benefits eligibility, and reporting. For help with Job Profile selection, reach out to Classification and Compensation.

Edit Position Restrictions Q&A

- Is it possible to add a notification for the HR Partner when the edit position restriction task is approved by HR CCA? Currently the only way to see if it is complete is to check your archive. It's possible the manager is getting a notification (I'm not positive), but the notification for the HR Partner would be helpful.
  - *This should now be built out but please let us know if these notifications do not come through.*
- Is a promotional announcement appropriate even if there are no pay changes? For example, updating language for a position that is outdated after a re-org?
  - *If a position has been modified via Edit Position Restrictions, the only way to ensure the current employee is seated into the updated version of the position is through a Promotional Announcement job requisition and application process. Because of this, departments should only modify positions when necessary to avoid creating additional administrative work for both the department and employee. For additional guidance on Promotional Announcements, please see: https://hr.colostate.edu/promotional-announcements-in-workday/.*
- If updating a current employee's position description with additional responsibilities and a title change but no change to position classification/job family or salary, which WD function would be the most appropriate to accomplish this: "Edit Position Description" or "Change Job" or "Promotion"
  - *Edit Position Restrictions followed by a promotional announcement job req and job application. Once the employee is moved to Ready for Hire within the job req, the department will select Change Job > Promotion. A promotional announcement job req and application are required.*

Payroll Accounting Adjustments

What are Payroll Accounting Adjustments (PAAs)?

Payroll Accounting Adjustments (PAAs) are a Workday Financial function used to correct how payroll expenses are recorded on the general ledger after payroll has processed, without changing employee pay or re-running payroll.

PAAs fix the accounting impact of payroll, not the payroll itself.

Who Can Initiate PAAs?

Finance Partner

HR Partner

Before You Start (Helpful Checks)

Confirm all of the following before creating a PAA:

- Payroll has already processed
- Employee pay is correct
- The problem is **WHERE** the expenses posted, not the pay amount
- You have Finance Partner or HR Partner security role

Payroll Accounting Adjustment Process End to End

Finance Partner or HR Partner:

Initiates & Submits 'Create Payroll Accounting Adjustments' Task in Workday

Finance or HR Partner:

Complete Questionnaire

Business Officer:

Reviews and Approves

Sponsored Programs:

Reviews and Approves

Payroll Accountant:

Reviews and Approves

You will **only** see a "Complete Questionnaire" task in 'My Tasks' when the **adjustment includes a sponsored account.**

The process will route to the Business Officer for **approval only when the pay period being adjusted exceeds three months from the current date.**

The process will route to Sponsored Programs for **approval only when a sponsored account is included in the adjustment.**

PAAs vs. Retro Payroll Corrections (High-Level)

Scenario	Correct Workday Tool
Pay amount is wrong	Retro payroll correction
Pay is correct, but posted to wrong account	Payroll Accounting Adjustment
Employee should not have been paid	Payroll correction
Expense belongs to a different KFS account or grant	Payroll Accounting Adjustment

Comparison of Costing Allocations, Org Assignments and PAAs

In the issue is…	Use…
Default funding is wrong	Organizational Assignment
Payroll needs to split or post to grants/projects	Costing Allocation
Payroll already posted incorrectly	Payroll Accounting Adjustment (PAA)

Payroll Accounting Adjustments Q&A

- Can PAAs be used to move some of a Period Activity Pay to a different account? At what point in the PAP can we enter a PAA? ie. PAP is for all of summer, some hours from May need to be adjusted.
    - *Yes, it can be done. The PAA is after the payroll is run.*
- There is an employee from a different department whose salary was charged to an account in my department. In this case would a payroll accounting adjustment be used to correct it?
    - *Yes*

Payroll Accounting Adjustments Q&A, continued

- If an hourly employee with multiple roles selects the wrong position during a pay period that has already been unlocked and then permanently relocked, the process for ensuring they are paid correctly is unclear. Submitting a Payroll Accounting Adjustment (PAA) only updates the account but does not correct the pay rate. When HR liaisons advise managers to submit a help ticket, central payroll often redirects them back to the liaisons. However, HR liaisons do not have the ability to edit pay periods that are permanently relocked. This creates a cycle of confusion and delays in resolving the issue. Can you please clarify the process for all parties involved?
  - *If time needs to be adjusted for a pay period that is locked the HR liaisons needs to reach out to central payroll and the period can be opened for a short period of time so corrections can be made. The liaisons can reach out by case ticket once we are caught up. right now it is better to reach out by email to ensure timeliness. Currently all bi weekly pay periods for January through June are open through 6/19.*

End Job / Termination

What is End Job and Termination in Workday?

End Job allows you to end one job when an employee holds multiple jobs.

Termination allows you to end all jobs, positions, and academic appointments for an employee.

Who can initiate a termination?

Terminations can be initiated by:

- HR Partner (Voluntary & Involuntary)
- Manager (Voluntary only)

The approvers include:

- HR Partner or Manager
- Student Employment or the Graduate School, depending on the employee type

Termination Reasons

- Voluntary
  - Commute Time
  - Conversion
  - Death
  - Dissatisfied with Job
  - Dissatisfied with Management
  - Dissatisfied with Pay
  - Emerit
  - Failure to Return from Leave
  - Family Reasons
  - Job Abandonment
  - Moved
  - Not Authorized to Work – Did Not Pass Background Check
- Voluntary (continued)
  - Not Authorized to Work – I-9
  - Other Employment
  - Retirement
  - Unknown
- Involuntary
  - Administrative Separation / Organizational Factors
  - Conduct Based
  - Layoff Due to Lack of Funding
  - Performance Based
  - Policy Violations
  - Workforce Reduction

Termination Business Process

- Initiated By
  - HR Partner
  - Manager
  - Employee as Self
- Involuntary Terminations
  - Must be initiated by HR Partner
  - Requires attached approval from Office of General Counsel
- Approvals
  - Manager if initiated by HR Partner
  - HR Partner if initiated by Manager
  - Student Employment if Student
  - Graduate School if GA and involuntary termination

The **Termination** guide provides the steps on how to terminate an employee in Workday.

The **End a Student Job** guide provides steps on how to end a job in Workday.

Important Considerations

- Make sure you use the end job is they have multiple jobs; termination ends all jobs.
- Managers can only initiate voluntary terminations.
- When an HR Partner is terminating an employee that reports directly to them, they will only have the Voluntary reason codes available.
- For biweekly/hourly employees, use the current date or a future date. Do not back-date the termination date.
- The Regrettable and Eligibility fields only appear when the HR Partner initiates the Terminate Employee task. If a Manager initiates the task, these sections will not appear. Once the task is submitted and routed to the HR Partner for review, they can edit these fields, as needed.
- Leave the position open if you plan to refill within the current or next fiscal year. Close the position if there are no plans to refill or if the role will change significantly.
- Do not enter any disciplinary or confidential information in the Comments field, including details about why the employee's job is ending, especially if the separation is involuntary.
- An attachment is required if the termination is involuntary to demonstrate approval of the termination by the Chief Human Resources Officer or Office of General Counsel.

End Job Termination Q&A

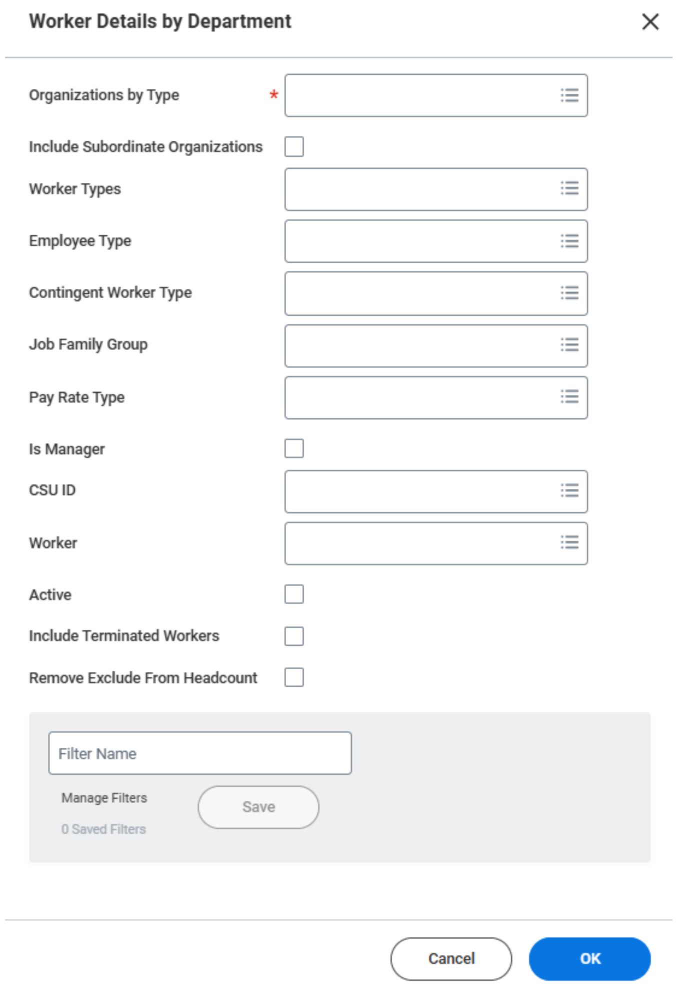
- How is the zero credit report and student graduation terminations going to work in Workday?
  - *The grad termination notification from student plan was just sent out in the last few days inviting HR partners to change people to non-student hourlies or they're going to be termed up as of a certain date. Please refer to the email.*
- When terminating an employee that is a supervisor, do we need to move the employees that report to them to another supervisor before entering the termination? What job aid would we use to change supervisors?
  - *If you just terminate a supervisor, Workday automatically makes that person's Manager, the supervisor, so they inherit that. Use the Move Worker job aid.*
- If we end a primary job for a student, and they have 2 other jobs in different departments, which HR partner would complete the switch primary job task for the student. Would the routing go to both HR Partners in the other departments?
  - *It should go to the HR Partner that initiated the request.*

End Job Termination Q&A, continued

- Under the termination task, in position details, if we keep the job open, then learn later in the year or following year that we are not going to back fill it, are we able to close that position and if so where does that happen within Workday?
  - *There's a close position task.*
- If we are processing an involuntary termination and need to add documentation, what kind of documentation is expected. Just the final letter, or should any incident documentation be included if there was a genuine safety, negligence, or behavioral issue that led to the separation? What is considered necessary vs. what is confidential information?
  - *Only attach the letter that shows approval.*
- It was mentioned that for involuntary terms, HR Partners should submit a letter from OGC on the term. We have seen our depts using these involuntary term reasons and just uploading the resignation letter - can we add some help language that involuntary term reasons should only be used for certain reasons and that the uploaded doc should be a doc from OGC and not just the resignation letter?
  - *We will make a note to add this to the help text in the business process.*

Other Reports

Worker Details by Department Report



This report gives you a comprehensive view of all the employees for the sup orgs that you support.

You can utilize the report prompts to view specific infor

Graduate Student Q&A

- Can departments/units deactivate compensation plan while keeping the employee in an active status? For example, A GRA will not work from May 16-August 15 but will work again starting August 16. Can we deactivate the compensation plan effective May 16-August 15 and then reactivate it beginning August 16. Essentially this would be like a "suspend" that we were able to do in Oracle.
  - *That's a perfect use of the 9/9 employee, nine-month work period, nine-month disbursement period. They won't be paid for May 16th through August 15th, but they will be considered active and they won't have to be rehired.*
- I had a GTA, moving from a different department to our department. We could not change the ending date while I am processing the Job Change request for him. The option was grayed out when the request came back to me after being approved by the other department. I wonder it was because we passed the ending date of the current job. I was told that once the new job comes effective date, I can do another Job Change request to change.
  - *This is one of those things where when somebody is transferring, certain things are available to one department and not the other department. If there's something that you can't change, that would be appropriate. They come over, and then once you have access to them, you can just submit another Job Change to update.*
- Clarification on the process if somebody doesn't get paid - i.e. graduate student misses paycheck. Is this handled by correcting the issue in Workday and creating a case? How do we know it is being handled and when the student should expect payment?
  - *If somebody missed a paycheck or was paid incorrectly, not because of a payroll issue, but because of a data issue, like something was wasn't set up correctly on their job, then if you make that change retroactively, that change will be recognized in the retroactive processing that Payroll does. So, they will get picked up in the next out of cycle payment. If you need them paid immediately, you can create a case for payroll to help with that.*


CSU SYSTEM
COLORADO STATE UNIVERSITY