

# PHASE 1 - WORKDAY HCM FREQUENTLY ASKED QUESTIONS

4.4.2022



## Table of Contents (links)

<b>Absence</b>	<b>2</b>
Calendar	2
Time off and Leave of Absence Requests	2
FMLA	4
General Absence	5
<b>Accessibility</b>	<b>5</b>
<b>Benefits</b>	<b>5</b>
General Benefits	5
Deferred Compensation/Retirement Investors' Club (RIC)	6
<b>Change Network - Executive and Judicial Branch</b>	<b>8</b>
<b>Delegation</b>	<b>8</b>
<b>Expenses - Travel Expense Reimbursement</b>	<b>9</b>
Submitting Spend Authorizations and Travel Expense Reports	9
General Travel Expense Reimbursement	10
Travel Cards	11
<b>General</b>	<b>12</b>
<b>HCM Core/Onboarding</b>	<b>13</b>
<b>Mobile</b>	<b>14</b>
<b>Payroll</b>	<b>14</b>
Payslips	14
Deductions and Withholdings	15
General Payroll	16
<b>Support</b>	<b>16</b>
<b>Time Tracking</b>	<b>17</b>
Work Schedules	17
Work Reporting Codes	18
Delegation and Timekeeping Role	19
External System Integrations	19
Time Entry and Approval	20
<b>Overtime and Comp Time</b>	<b>22</b>
<b>Training</b>	<b>22</b>

# Absence

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## Calendar

**Can the absence calendar be viewed using other calendars (i.e. Google or O365) or do we have to log into Workday to view absence?**

Employees will need to login to Workday to view the Absence calendar.

**Does Workday include a calendar function for personal or groups?**

No - Workday does not have a meeting calendar for personal or group use.

**For clerks with multiple counties, is the calendar combined?**

Yes - the absence calendar shows different counties on the calendar combined.

**Are employees expected to do ALL of the following: (1) submit a request for time off, (2) populate the work absence calendar, (3) and then approve their time card? Or does (2) happen automatically after (1) is approved?**

The absence calendar will automatically populate when a time off request is approved.

**Where can I see approved time off and leave?**

You can see approved time off and leave on both the Absence Calendar and on your timesheet.

**When I request time off, does the leave request automatically acknowledge my work schedule?**

Yes - you cannot request more hours off than what you are scheduled to work.

**Am I able to see the absence calendar for my entire agency, peers, or non-team members?**

The View Teams button on the Absence Calendar allows you to see your teammate's days/time off, but not the reason why.

## Time off and Leave of Absence Requests

**What is the difference between Time Off and a Leave of Absence ? When should each be used?**

Time Off is a short time away from work, where the expected return date is typically known up front. The request is based on each day the employee is expected to be off work. Examples include sickness, vacation, jury duty, etc. With time offs, there is no visible status change in Workday, so the employee will remain active. Therefore, they do not need to be officially returned from time off.

On the other hand, a Leave of Absence is generally a long time away from work. The return date is not always known, it may just be an estimate. Examples of this include medical leave, FMLA, worker's comp, military leave, etc. For Leaves of Absences, there is a visible status change in Workday. It will show "On Leave" next to their name while they are out to managers and HR staff. The employee must officially be "returned from a leave of absence" to become active again.

**Can managers edit an employee's absence request if there are small errors?**

Yes - Managers can edit an employee's absence request.

**Can I change or cancel time off and leave requests?**

Yes - you can edit Absence requests that have already been approved, but editing requires submissions to be re-approved. If an Absence request has not yet been approved, you should cancel the request and resubmit. If you need to add another day to your Absence request, you should submit a new request.

**Can someone else submit time off and leave requests on my behalf?**

Managers and HR staff can submit these requests on behalf of employees.

**How far in advance can I request time off and leave?**

No further than one year, although internal agencies may have their own policies. Please note you will receive an error if you do not have enough hours in your leave balance unless you are a salaried worker and will accrue the time by the requested date. Workday includes the hours from future-dated time of requests when determining whether an employee has enough hours available in his/her balance to make a request and will not allow a balance to go negative.

**When will time off and leave requests reduce my leave balance?**

Leave balances update after the day that time off and leave occurs, not the day it is approved.

**\*Updated\* Do I need to submit multiple time off and leave requests when they are across pay periods?**

No - You can submit one request across pay periods in Workday, not to exceed 30 days.

**Are managers able to block time to prevent vacations when there are projects that make vacation requests impossible to fulfill?**

No - Managers can deny the vacation requests, though there is currently no time block function in Workday.

**When we approve leave time, do we see what type of leave the employee has selected?**

Yes - Managers/Approvers can see the type of leave when approving an absence request.

**If an employee requests three hours of sick leave, but ends up using only one hour, how will this be resolved?**

The employee can edit the request before it has been submitted to Payroll to correct the hours. The employee can also edit the request after it has been submitted to Payroll and the remaining two hours will be credited back to the employee.

**Are (FLSA) exempt employees still be able to enter leave requests if they are not going into the system to approve their timesheets?**

Salaried (FLSA-exempt) employees enter absence requests, which updates their absence calendars and timesheets once approved.

**What is the process to handle an absence request when the employee's accrual balance won't cover the hours requested, and how do you authorize leave without pay for those who don't have enough time accrued?**

The employee will receive an error message when trying to submit an absence request if they do not have enough hours accrued to cover the requested hours. There is a selection in Workday for leave without pay (unpaid time off) for those who request time off when they do not have sufficient time accrued. Employees should work with their manager if they plan to take unpaid time off.

**Do Absence requests have to be entered before the date the time off or leave is taken, or does Workday accept the entry after the fact? Can you view the already approved time off or leave when considering a new request?**

Absence requests can be entered after the time off is taken. However, if the employee does not have enough time accrued for the hours requested, the employee will need to take unpaid time off subject to agency policy. Managers can view an employee's accrual balance prior to approving a new absence request.

## FMLA

**Is the Reed Group going to continue to manage the FMLA process or will managers make the determination?**

No - Leave management for State of Iowa employees, including FMLA, has transitioned to the DAS Leave Administration Team. For more information, refer to the [FMLA FAQs](#) or contact the DAS Leave Administration Team at **515-72-LEAVE** (515-725-3283) or [LOA@iowa.gov](mailto:LOA@iowa.gov).

**How do I take FMLA leave?**

When you request time off or leave, you need to enter the appropriate FMLA type. Refer to the [Smart Guide](#) for assistance.

**How does intermittent FMLA work?**

For intermittent FMLA, Employees will request an intermittent FMLA type from the absence calendar. The request will go to the DAS Leave Administration Team and will follow the same process as a continuous condition. Once the employee receives a designation the leave is approved the employee will use intermittent FMLA time off types on their absence calendar.

**My FMLA leave is intermittent. Why does my Workday Absence Calendar look like I am out of the office every day?**

An approved Leave of Absence will show on your Workday Absence Calendar as a green line spanning the entire length of time of the approved leave. It serves as a placeholder to help you more efficiently request your related time off in the future. The line is only visible on your own calendar and for your HR Partner and Supervisor, not your coworkers or other team members.

**Can I open a brand new FMLA leave of absence on my phone in Workday?**

Yes! To initiate a new Leave of Absence request in the mobile app, select your photo or cloud icon in the upper right corner to view your Profile. Then select the three dots in the upper right corner to see the Action options. Scroll down to select "Time and Leave," then "Request Leave of Absence." Remember: This process is for creating a new leave - not entering dates and hours related to an existing leave already on your absence calendar.

**I have been on FMLA for the last six weeks recovering from an illness. Must I have a doctor's note to return to work?**

Yes, you must provide your Manager or [Human Resources Associate](#) (HRA) with a Return to Work note on or before the date you return.

## General Absence

### **\*Updated\* Why is my sick time accrual less than normal (or negative) even though I had 80 hours paid for the pay period?**

Workday calculations deduct family care hours from sick time accruals, not the employee's sick time balance. Your sick time accrual may also show negative if you convert sick time to vacation time.

### **Does future approved time off need to be re-entered after Go Live?**

Yes - Previously approved time off requests for vacation or sick time for dates on or after September 17, 2021, need to be re-submitted in Workday. Active and approved FMLA leave and other leaves of absence do not need to be re-entered. The DAS Leave Administration Team is assisting employees with open leaves of absence.

### **Were Employee elections for sick time conversion carried over from HRIS?**

No - This election was not carried over from HRIS. Employees who wish to convert sick time to vacation hours will need to set their conversion flag in the Payroll worklet. Please see the employee [Smart Guide](#) for step-by-step instructions.

### **What is the difference between a Vacation Buyout and Vacation Payout?**

A Vacation Buyout is when an employee cashes in vacation hours. A Vacation Payout occurs upon termination. Both processes will occur in Workday.

### **How are hours donated or converted to vacation reflected in Workday?**

Hours donated or converted to vacation are reflected as a negative accrual.

### **How will Catastrophic Leave Donations be handled in Workday?**

Catastrophic Leave Donations are an Absence process in Workday. Please see the employee [Smart Guide](#) for step-by-step instructions.

## Accessibility

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### **Does the JAWS computer program work in Workday?**

Yes - Workday supports a variety of browsers and screen readers, including JAWS.

## Benefits

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### General Benefits

### **Will employee benefits and deferred compensation need to be re-entered into Workday at Go Live or will that information automatically transfer over?**

No - All benefits and deferred comp information will automatically be transferred from the previous system.

**How will employees handle open enrollment in Workday?**

Benefit enrollment and change will be done in Workday. Smart Guides, Webinars, and resources will be available to assist employees in the benefits enrollment process in Workday.

**Why does my Open Enrollment confirmation in Workday show health/dental insurance effective dates of 1/1/2021 and a Flexible Spending Account (FSA) effective date of 1/1/2022?**

Because you must enroll in the FSA every year, the effective date shows as 1/1/2022. If you did not make new health/dental elections during Open Enrollment this year, the system confirms the previous election effective date of 1/1/2021 - the date your insurance originally became effective.

**How will missed premium deductions be handled in Workday?**

Employees who do not have sufficient funds to collect premiums due will fall into arrears. The full dental and life arrears will be collected in the following pay period if possible. For health arrears, the system will collect up to the normal biweekly amount until all arrears are zero.

**Where do I find my Vision benefits in Workday?**

Vision elections appear on your payslip. Employees may also ask their HR Partner to view the information for them. To do this, HR staff will navigate to the employee's Worker Profile > Pay> Input > Avesis/Eyemed under the Pay Component column.

**Do beneficiaries listed under Basic Life apply to Supplemental as well?**

Yes - Beneficiaries listed under Basic Life apply to Supplemental as well. You cannot choose different beneficiaries for Basic and Supplemental. See the [Managing Benefits Smart Guide's](#) Add or Change Beneficiary Information section for instructions on how to update beneficiaries.

**Deferred Compensation/Retirement Investors' Club (RIC)****Can I change beneficiaries or dependents in Workday?**

Yes - but only in relation to medical, dental, and life insurance. IPERS beneficiaries will still need to be changed through IPERS and RIC deferred compensation beneficiaries will need to be updated through your RIC provider.

**Can I roll a previous 401k into my RIC?**

Yes - If you are already a RIC saver, simply contact your RIC provider representative for help. Your provider will help you initiate the request to roll (non-taxable transfer of assets from an outside retirement plan to RIC) your money from the outside plan into your RIC account. If you need additional help, contact the [RIC team](#) for assistance.

**What is the RIC contribution limit, and does dollar amount or percent take precedence?**

The IRS Regular 457 plan annual contribution limit is \$19,500. If you are 50+, the limit is \$26,000. The ability to contribute over \$26,000 may be an option prior to retirement if you qualify. See [IRS 457 Plan Contribution Limits](#). The choice of dollar or percent amount does not matter.

**Is the deferred compensation percent contribution on gross pay or post tax pay?**

Contribution percent is on gross pay.

### **What is the State of Iowa RIC match, and is it monthly or per pay period?**

The match is \$75/month.

### **Who is eligible for RIC?**

You are eligible to contribute if you are a permanent or probationary employee of the State of Iowa working 20+ hours per week or have a fixed annual salary. This program is not offered to Board of Regents Institution employees.

### **Were my current Deferred Compensation elections brought into WD? And where can I go to view plans, make changes, etc.?**

Yes - Your current deduction elections are in Workday. For investment option selections, either sign into your personal account on your provider's website or contact your advisor to help you change your investment selections. There is no cost to ask your provider to help you. [See provider contact information](#). There are no fees or restrictions for changing your investment selections in your 457 or 401a accounts.

### **I don't see MassMutual as a provider?**

MassMutual Retirement changed its name to Empower. Your investments have not changed.

### **What's the difference between a 457 and 401 plan?**

When you enroll with the RIC Provider, you will open two retirement savings accounts.

- A **457** account to receive your pretax and Roth payroll deductions (no minimum) and rollover assets from eligible outside retirement plans (457 deductions are elected in Workday.)
- A **401a** account to receive the employer pre tax matching contributions of up to \$75 each month and rollover assets from eligible outside retirement plans (401a contributions are sent by our employer and do *not* require elections in Workday)?

### **What's the difference between pretax and Roth for RIC?**

Your 457 plan will accept both pretax and Roth contributions.

- **Pretax** - Payroll deductions are taken *before* state and federal tax withholding. This gives you an immediate tax benefit of lowering what is reported to the IRS as taxable income by the amount you save each year. Investment earnings grow tax-deferred. As you take the money out, you are taxed at your ordinary income rate.
- **Roth (post-tax)** - Payroll deductions are taken *after* state and federal tax withholding. There is no immediate tax benefit. Investment earnings grow for tax free income. When you take Roth money out, earnings are tax-free if the withdrawal meets the requirements of a [qualified Roth distribution](#).

### **Can I suspend deductions or set dates for deductions for RIC?**

You may stop deductions at any time. Stop requests are immediate in the month you elect it.

### **Can I have multiple providers/plans for RIC?**

Yes.

**Is it possible to enter a new RIC amount and generate a new pay stub to see net pay changes in Workday?**

Employees are not able to test changes to net pay, but HR staff will have this functionality. Please work with your HR Partner to see how changes to RIC affect your net pay.

**Does the order matter for RIC when signing up with the provider or setting up in Workday?**

It is recommended you first open your 457 employee contribution account and your 401a employer match account directly with the RIC provider of your choice. Then make your deduction election in Workday.

**What is the timing of when changes to RIC elections take effect?**

Payroll deduction changes are effective the first check of the month following your change request.

**Does the amount I choose to contribute to RIC reduce the amount contributed for IPERS?**

No - IRS annual maximum contribution limits for IPERS and RIC plans are separate and do not affect each other.

**What is the timing of when changes to RIC elections take effect?**

Payroll deduction changes are effective the first check of the month following your change request.

## Change Network - Executive and Judicial Branch

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**Who is our Change Agent?**

See the [Change Agent Directory](#) for designated Change Agent(s) for Executive and Judicial branches.

**Who is our Change Champion?**

See the [Change Champion Directory](#) for designated Change Champion(s) for Executive and Judicial branches.

## Delegation

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**To whom can I delegate a task in Workday?**

Delegation should be made at peer or higher level, but there may be exceptions on a case-by-case basis. It is possible to delegate to subordinates, but agencies will need to submit a request to the WorkSmart Help Desk and convey the scenario and which manager the clerical support members need to assist so the WorkSmart team can provide access - whether through delegation or other security role assignment.

**Is there a way to delegate, but still have the ability to complete tasks yourself?**

Yes - you must select the Retain Access to Delegated Tasks in Inbox checkbox on the Manage Delegation page.

**\*Updated\* If a Supervisor is delegated, does that give them access to the absence calendar?**

No - the delegated Supervisor will not be able to view the team's absence calendar.

**Is there a term of delegation? Or can it be set permanently?**

Yes - Delegation is set for a specific time period. It is not meant to be permanent. A permanent change will require a different process.



**Can you delegate to more than one co-worker or set up more than one delegate for the same business process?**

Yes - multiple delegations are allowed in Workday. You may delegate the same business process to more than one person, and you may delegate different people for different business processes.

## **Expenses - Travel Expense Reimbursement**

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### **Submitting Spend Authorizations and Travel Expense Reports**

**How do I submit expenses for mileage?**

At the line level, choose the applicable “Mileage” Expense Item that is applicable to your travel.

**Can I submit expenses for multiple meals at once?**

While you have the option to submit expenses for individual meals, you can also select the applicable “Combined Meals” Expense Item to submit one expense line that covers all three meals in a day. If choosing the “Combined Meals” Expense Item, you will need to include receipts for each meal as an attachment.

**Can I skip a meal when submitting expenses, and use that amount toward another meal?**

Yes - If you are eligible for three meals in a day, you can skip a meal and add the dollar amount of the skipped meal toward another meal that day. Similarly, if you are only eligible for two meals for the day, you can skip one and use the total allowed for two meals on one meal. Use the “Exception” expense item to record those meals. Remember, meal policy has not changed. Meal eligibility is based on the time you leave for work and the time you arrive home. Check with your agency for internal determination on this policy.

**How do I submit expenses for tips?**

Tips are included as part of the Meal Expense Items, and can be a maximum of 15%. Please follow your current agency finance guidelines for documenting tips.

**How do I submit expenses for groceries?**

Use the applicable Combined or Individual Meal Expense Items, see [Procedure 210-102](#) for details.

**When do I use Itemization, and do I need to update Worktags for multiple funding sources?**

Itemization is a field that exists on Expense Reports but not on Spend Authorizations. This field is used if any of your travel is funded partially by different grants. The fields in the Worktags section [Fund, Appropriation, Organizational String (I3), and Costing String (I3)] are costing details and can be left defaulted by employees. These funding details will be updated by FIN teams as needed during the review and approval process.

**Are attachments required for Spend Authorizations and Expense Reports?**

In general, attachments are required for Expense Reports because these are actual incurred expenses, but are not required for Spend Authorizations in Workday. Some agencies may have specific policies requiring attachments for Spend Authorizations or not requiring an attachment for Expense Reports. Please follow your Agency’s current policy about this topic.

**Do we need to set up our direct deposit for Travel Expense Reimbursement payments, or is it already set up?**

Expense Reimbursement elections from 1/3 were already loaded into Workday, but changes can be made in Workday if you are an employee who travels for the State.

**How do I add vacation days to a trip?**

Please follow your current agency's policy and procedures for vacation days. In the Header section, the start date and end date of the trip should include your vacation days. However, the individual Expense Item lines should only include the details of the non-vacation expenses. Finally, in the main comments section, you should note to your financial team the specific vacation dates to explain why the header and the expense line dates are different for transparency purposes. Please contact SAE with any questions.

**How do I upload Expense receipts?**

While it is not required to use the Workday mobile app, it is very helpful for travelers. Users must attach receipts of expenses to submit Expense Reports, and the mobile app allows you to take photos of your receipts and upload them directly to Workday. You can then pull these photos of receipts into an Expense Report in Workday on your desktop or laptop, or create an Expense Report via mobile. Please view the [Mobile Expenses Smart Guide](#) for details on this process. Note: Based on the State's retention policy, Travelers need to keep receipts for a year or need to follow their agency's current policy.

**Am I still required to get Travel Comparisons, such as multiple airline quotes and choosing the cheapest option?**

Yes - Upload these with your Expense Report. There have been no policy changes around this topic.

**Will scans and photos of receipts be acceptable in lieu of paper receipts, and do we still need to keep our original paper receipts?**

The Auditor's office has approved the use of electronic copies of receipts for travel expense reports. Scans or photos of receipts can be uploaded to the system. Per the Auditor's office, original receipts do not need to be retained after they are scanned or photographed. Please refer to your agency's internal policy for additional receipt requirements.

**General Travel Expense Reimbursement**

**What is a Spend Authorization and how is it different from an Expense Report?**

Spend Authorizations are used to request authorization and estimate anticipated spending and are required for out-of-state & international travel only. They are the Workday equivalent of a Travel Document Authority (TDA) in 1/3. Expense Reports are used to submit travel-only expenses for reimbursement and are the Workday equivalent of Travel Payments in 1/3. Expense Reports are submitted for both in-state and out-of-state travel.

**Is there a best practice for Spend Authorization dollar estimates?**

Employees should include all expense items that may be incurred, and estimate the cost on the higher end for expense items because it is not possible to edit an already approved Spend Authorization in Workday during Phase 1. Edits would occur in 1/3 by an agency's financial team.

**What is the approval process after an employee submits a Spend Authorization or Expense Report?**

After an employee submits a Spend Authorization or Expense Report, Managers are the first to review and approve the transaction. Depending on the specifics of the submission, there are additional

higher-level approvers that will be the final reviewers. Approvers have the option to send back the Spend Authorization or Expense Report if something needs to be updated, or add an approver if someone else needs to review it.

**When should Expenses be submitted in I/3 vs. Workday?**

Now that Workday is live, all employee Out of State travel requests are to be submitted in Workday via the Spend Authorization. Expenses for travel previously initiated and approved via the Online Travel Authorization (OTA) portal prior to September 17 should be processed in I/3, even if travel occurs after Go Live. Reimbursement of In State and Out of State travel will be processed via Expense Reports in Workday. Please refer to the list of [Workday Phase 1 Expenses](#).

**Is there a feature that will allow an employee to approve a vendor bill before the supervisor gives final approval?**

Vendor invoices will be a part of Phase 2 - Workday Financial (FIN).

**What are non-travel expenses?**

Examples of non-travel expenses are shoes, uniforms, cleaning of uniforms, postage, filing fees, etc. Please refer to the list of [expenses](#) allowed for Workday Phase 1.

**Can Managers edit expense reports, and can an extra reviewer be added to the process before the Manager's approval?**

No - The Manager can either approve the expense report or send it back with notes, but they cannot edit it. No - An extra reviewer cannot be added before the Manager's approval. Once an expense report is filled out and submitted, it goes directly to the Manager.

**Travel Cards**

**When do the Travel Card transactions show up in Workday so they can be assigned to an employee?**

It takes three business days for Travel Card transactions to appear in Workday.

**Is it possible to split Travel Card transactions between multiple people, reassigning an expense to more than one individual?**

It is not possible to reassign an expense to multiple people in Workday. The recommendation is for a Department Travel Card holder to assign it to themselves. During the payment process, the Finance team will allocate the cost for the transaction to each employee the cost is associated with in I/3. Costs reassigned in Workday will not be tagged to your Employee record because the reports run off the payments in I/3.

**Do we need a new Travel Card for Workday?**

No - You use the same card you already have.

**Will the US Bank payment for travel cards occur in I/3 or Workday?**

The payments will still be done the same way they currently are done in I/3.

**What if a third party pays for the travel?**

If it's an out-of-state expense, this can be noted on the Spend Authorization line using the Other field in the Item Details section, which indicates the expense has an "Other" as funding source. On the Expense

Report, you will not create an Expense Line for these types of items because the employee is not being reimbursed for a 3rd party's payment.

**Do all Travel Card charges have to be reassigned to an employee before we can pay the bill?**

No - You can pay the U.S. Bank payment when you have all the documentation. However, Travel Card charges do need to be assigned prior to an Employee's trip, or the Employee will not be able to pull them into their Expense Report.

**Will the assigned employee receive a notice or do they have to go into expense transactions and look for it?**

Employees will not receive a notification. They will need to check in Workday, by searching My Expense Transactions in the Search Bar. Reassigned expenses will also appear at the bottom of the Expense Report Header when an employee creates an Expense Report.

**Is the process the same when another agency pays for the expenses?**

The process is essentially the same, except the department travel card holder of the agency who booked the travel will complete the expense reassignment in Workday.

## General

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**What does HCM stand for?**

Human Capital Management

**Is the FDM something that is relevant to supervisors in the field?**

The Foundation Data Model (FDM) will be more relevant to those who work in finance and HR financials.

**Are contractors able to use Workday?**

No - Only State Employees will have access to Workday.

**Did previous HR systems end once the Workday system went live?**

Systems such as eLeave and HRIS remain available for reporting purposes only since Workday is now live. Workday is now the official system of record for HR business processes.

**What is a security role?**

Workday security roles determine an employee's ability to initiate or approve certain business processes in the system. All employees are able to perform Employee Self-Service activities. Managers identified in an Agency's Supervisory Organization are assigned a manager role for Manager Self-Service. HR and Financial staff will have additional roles assigned to perform specific business processes.

**When will the out-of-scope functions (recruiting, learning, etc.) be added to Workday?**

Timelines for additional Workday modules have not been determined.

**What is a Worklet?**

A Worklet is essentially a shortcut to an application within Workday. Employees are able to see the worklets for the tasks they need to complete in Workday.

**Is Workday integrated with Google?**

No.

**Are we able to use the mobile device Workday app, and can we integrate the app with Microsoft Teams?**

Employees will be able to use the Workday mobile application on any smartphone. There are no plans to integrate Microsoft Teams with Workday at this time.

**When will agencies be able to set up agency-specific tasks/processes?**

One of the benefits of a statewide HR and Financial system is process consistency. If an agency wants to request specific tasks and processes, they may submit a change request to the WorkSmart Help Desk.

**How do I run a report on multiple employees or items at once?**

To select all employees or items in a drop-down list, hold Ctrl A, then click enter (or click in the box to the left of the first name in the list and all of the names will be selected. If it's a radio button (circle), multiple selections are not available.

**Will the public be able to see Workday activity, for example the Sup Org Chart?**

No - Workday is for State employee access only.

**As a manager, am I able to see my direct reports and their employees?**

Yes - You are able to see basic information using the Sup Org Chart feature of both direct reports and any of their direct reports.

**Can a single sign-on into the computer allow access to Workday or do we have to complete a separate login to access the application?**

Workday will be a part of OCIO's Okta single sign on solution.

**Did you provide a chart showing what Managers and Employees need to do now that Workday is live?**

Checklists were provided at Go Live for [Employees](#), [Managers](#), and [HR](#). Each includes a series of tasks designed to help you verify your information and get up to speed during the first week of the Workday transition.

## **HCM Core/Onboarding**

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**Is the personal email address a required field and are personal email addresses in Workday visible to other employees?**

No - The personal email address is not a required field. Employees see their own personal contact information, but it is not visible to other employees.

**Are legal name changes validated by HR with appropriate documentation?**

Yes - Legal name changes are validated by HR against appropriate documentation such as a Social Security card.

**Who designates an employee's gender?**

Employees enter this information as part of onboarding.

**Are employees able to use self-identify pronouns if they choose or want to do so?**

No - Employees can only choose between male or female. More options may be included in the future, but they are not available at this time.

**How soon do new employees get access to Workday - on their first day?**

Yes - Employees have access to Workday on their first day if onboarded with the proper documentation for access.

**How does Workday notify employees and managers of actions they need to take?**

Notifications appear in your Workday inbox. You may also change your account preferences to have notifications sent to your work email address. See the [Change Account Preferences Smart Guide](#).

## Mobile

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**Can all employees use the Workday Mobile App?**

Agencies supported by OCIO for IT services may use the Workday mobile app unless prohibited by agency policy. If your agency has an internal IT department, check for any policies regarding mobile apps on work and personal devices before downloading.

**How do I download the Workday Mobile App?**

Step-by-step instructions for Installing Workday Mobile for [iOS](#) and [Android](#) are provided in Smart Guides posted in the Training section of the [WorkSmart.iowa.gov](#) website.

**Is the mobile application secure?**

Yes - The State of Iowa and Workday have policies in place to ensure the protection of employee data. For example, employees are unable to download data or change banking information via the mobile app.

**What if I don't have a mobile device or don't want the Workday Mobile app?**

The mobile app is an option, not a requirement. While convenient for employees on the go, those who work primarily on State premises or are remotely connected to a State network via VPN may not need it.

**Where can I find a list of mobile capabilities?**

A breakdown of [mobile self-service capabilities](#) is available in the Resources section of the [WorkSmart.iowa.gov](#) website.

## Payroll

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### Payslips

**Is there more information on the Workday payslips?**

Yes - Payslips will provide more information than the previous online warrant. For example, earnings are broken out into separate lines vs. lumped into gross pay. Employees should review their payslips each pay period to validate pay.

**Is the hourly rate of pay placed on the new payslips?**

Yes - The hourly rate of pay is shown on Workday payslips.

**Do we have access to our old pay warrants now that Workday is live? If so, for how long?**

Online warrants from prior HRIS pay periods will be available for historical purposes in the online payroll warrant portal.

### **How are overtime calculations performed in Workday?**

Some payroll calculations have changed in Workday. Current flat amount special pays have become a percentage equivalent in Workday:

- Lead Worker
- Extraordinary Pay
- Special Duty
- Higher Rank Allowance

Premium Overtime Calculations continue to follow Fair Labor Standards Act (FLSA) guidelines. Overtime will be calculated based on each pay week vs biweekly and may vary based on special pay received each pay week.

### **Deductions and Withholdings**

#### **How are employees notified of any Withholding Orders?**

Employees are notified of any Withholding Orders - such as child support, IRS wage levies, sheriff garnishments, etc. - via their Workday inbox. Letters will no longer be mailed.

#### **Will the Child Support Fee be deducted even if funds are not available?**

The \$2 child support admin fee will always be deducted, regardless of funds available to take the support deduction.

#### **Are Student Loan garnishments based on a fixed amount or percentage?**

Student loan garnishments are based on a percentage, not a fixed amount, so the amount may change based on hours worked each pay period.

#### **Why is there a garnishment worklet on my Workday dashboard?**

A Garnishment Letter worklet has been added to the Workday dashboard for all employees. Any garnishments after Workday Go Live will be reflected in the worklet. Garnishments prior to Workday Go Live will not be reflected in the worklet. If you have no garnishments, an error message will be generated when the worklet is selected.

#### **What happens if an employee has an IRS Lock in Letter?**

If an employee has an IRS lock in letter with a designated federal tax election amount, then they will not be able to update their tax elections in Workday without contacting central payroll.

#### **Is the flat tax option for retirement still available?**

No, the flat tax option often used upon retirement is no longer available.

#### **Payment elections**

Payment elections are made in Workday and may take upto 10 days before they take effect on the employees payroll. The election must be fully submitted and approved by the employee and HRA before it will be included in the prenote file. **How are College Savings Deductions handled in Workday?**

College savings deductions have changed to an electronic Automated Clearing House (ACH) transaction. Employees with a college savings account will see a payment election for the Bank of New York Mellon, which is the bank for college savings deductions. The transaction will occur each pay period. Any other frequency (once or twice a month) is not an option. Employees will initiate/terminate college savings

elections, which will route to HR for approval. A College Savings Iowa account must be set up before an ACH can be initiated.

**How are Credit Union Deductions handled in Workday?**

Credit union deductions have changed to an electronic Automated Clearing House (ACH) transaction. The amount chosen as a payment election (either flat amount or percentage) will be deposited each pay period. Any other frequency (once or twice a month) is not an option. Employees who have credit union deductions but not direct deposit accounts will receive a paper warrant with the balance of their pay.

**Where do I find my Vision benefits in Workday?**

Vision coverage is not a State-sponsored benefit, but will appear on your payslip. Employees may also ask their HR Partner to view the information for them. To do this, HR staff will navigate to the employee's Worker Profile > Pay> Input > Avesis/Eyemed under the Pay Component column.

**General Payroll**

**Have previous payment elections etc., been entered into Workday?**

Employees' current payment elections have been transferred into Workday from the legacy system and do not need to be reentered by employees.

**Are employees required to use direct deposit?**

No - Direct deposit is secure, convenient, and highly recommended, but not required. Employees make payment elections directly in Workday.

**Are absences tied to payroll?**

Yes - Once an absence request is approved by the Manager, the approved absence is automatically applied to the Employee's timesheet for payroll.

**What happens if an Employee's payroll fails to process?**

If an employee's payment election fails to process, payroll will reach out to correct any misentered information.

**Will the One Gift campaign occur in Workday?**

Yes - The annual One Gift campaign will now occur in Workday. See [One Gift Smart Guide](#).

**How are W-2s distributed to employees?**

Employees will receive both paper and electronic W-2s unless they change their W-2 election.

**Will examples of reports be available? What can I pull from the system to develop my own reports and in what file formats?**

Workday has a variety of reports available for the different functional areas. Current reports are being analyzed to develop Workday reports similar to those provided today. Reports can be downloaded in PDF or Excel format.

**Support**

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**When we don't know how to do something, who do we ask?**

There are online support tools such as Workday Assistant and Smart Guides which an employee should use first when they have a question about Workday. Each agency also has Change Champions trained to provide on-site assistance to employees as the next level of support. They assist employees with



questions, but if they are unable to answer a question, they will escalate the question to the WorkSmart Help Desk.

### **How much will Change Champions be available for post Go Live support?**

The time commitment for a Change Champion post Go Live will depend on how many Change Champions are available within an agency to assist employees. The first 2-3 weeks after go-live will be when the majority of employees request assistance.

### **How do we submit ideas for enhancements to the Workday system as we identify functionality not yet available but we would like to request?**

You can submit a change request to the WorkSmart Help Desk one of three ways:

- Call: 833-WRK-SMRT (833-975-7678)
- Submit a ticket: [WorkSmartSupport.iowa.gov](https://WorkSmartSupport.iowa.gov)
- Email: [WorkSmartSupport@iowa.gov](mailto:WorkSmartSupport@iowa.gov)

## **Time Tracking**

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### **Work Schedules**

#### **What is a work schedule?**

Work Schedules are used to validate time tracking and time off and drive many related processes such as holiday and overtime. The standard eight-hour Monday through Friday work schedule will apply to most employees. Custom work schedules are available for employees who work shifts or variable schedules. Employees should confirm their work schedule is correct in Workday, and request a schedule change if needed. Please see the employee [Smart Guide](#) for step-by-step instructions.

#### **How often are employees allowed to select a work schedule? Will this be done on onboarding and then on a set schedule, or can it be done at any time that an employee wants to change their schedule?**

Work Schedules will be set at onboarding but can be adjusted as needed. The employee can request a Work Schedule change, but it must be approved by HR or a Manager.

#### **How do I request new Work Schedules?**

A [Smart Guide](#) is available to walk you through this process. If you are unsure, a Manager or HR Partner can do this on your behalf.

#### **How do I enter time if my schedule is flexible? Do I need to change my Work Schedule every time my hours vary from the schedule?**

You should put in the default schedule in Workday. No, your schedule would stay the same. Actual hours worked can vary a bit from the schedule, the schedule should just reflect the default days/hours you are scheduled to work each week. However, if the hours are going to vary greatly week to week you should update your Work Schedule.

**Do I need to use Work Schedules if my agency uses Kronos?**

Yes - Work schedules are used to validate time tracking and time off and drive many related processes such as holiday and overtime.

**Who can see another employee's Work Schedules?**

Managers and HR staff can view an employee's Work Schedule, but your coworkers cannot.

**Work Reporting Codes**

**Is there a summary report that will allow me to view and download work reporting code hours for my reports over a specific time period?**

Yes - Use the Work Reporting Codes by Worker report.

**How do I request new Work Reporting Codes?**

Please contact the WorkSmart Help Desk one of three ways to submit a ServiceNow ticket:

- 1) Call: 833-WRK-SMRT (833-975-7678)
- 2) Submit a ticket: [WorkSmartSupport.iowa.gov](http://WorkSmartSupport.iowa.gov)
- 3) Email: [WorkSmartSupport@iowa.gov](mailto:WorkSmartSupport@iowa.gov)

**Can I auto-populate or store my Work Reporting Codes when I submit time to speed up the time entry process?**

You can't auto-populate or store Work Reporting Codes, but you can copy your time from a previous week, and the Work Reporting Codes will be copied over too.

**Are Work Reporting Codes the same as time study for some agencies?**

Yes - For some agencies Work Reporting Codes (WRCs) will be used for time study. WRCs are based on the project, program, case, etc., the employee is working on.

**Do we have to block time on each day to match the time distribution?**

If you are using Work Reporting Codes (WRCs) to distribute time to multiple budgets, you will need to enter time on your timesheet and associate that time to the appropriate work reporting code.

**Is there a limitation on the number of activity/work codes in Workday?**

No - However, since these codes are selected from a drop-down menu, some agencies may want to combine codes where applicable and remove any codes which are not currently in use.

**My staff works on different projects frequently throughout the day. How will time blocks work?**

A Work Reporting Code (WRC) is selected for the hours worked on a project, program, case, etc. If an employee works two hours on a project, they will enter two hours worked and select the appropriate WRC for that project from a drop-down list.

**Do salaried employees need to fill out a timesheet if they use Work Reporting Codes (WRCs)?**

Yes - Salaried employees need to fill out a timesheet if they need to enter WRCs or other conditions are met. Please see the employee [Smart Guide](#) for step-by-step instructions.

**Is there a way to require salaried/FLSA-exempt employees to enter Work Reporting Codes (WRCs), and is an Employee only able to only select WRCs applicable to their bureau?**

Currently the configuration does not require employees to enter Work Reporting Codes (WRC) because not every agency uses them. Managers will need to ensure that those who use WRCs are entering them correctly when reviewing the timesheet. If WRCs are used, all hours for the pay period must be entered on the timesheet in order to be paid-for the-pay period. There will also be a report for WRCs available to agencies using them. The drop-down list of WRCs for selection purposes cannot be limited by the bureau, but employees will only be able to select codes for their agency.

**How is time distribution in multiple budget areas handled?**

Agencies previously using the M5 process in HRIS to distribute time to multiple budgets will use Work Reporting Codes (WRCs) in Workday to distribute time to multiple budget areas.

**How/who is in charge of adding and removing Work Reporting Codes (WRCs), and how are WRCs created?**

Work reporting codes are created by agencies and sent to the WorkSmart Project Team to be uploaded into the system for agencies who will be using them in Phase 1. Agency Financial Managers have been working with the Project Team to provide updated WRCs for Go Live.

**Delegation and Timekeeping Role**

**Are there roles for approving timesheets for non-managers (e.g., a lead worker)?**

Employees can have multiple roles. For example, their primary role is based on their job description, but they can have additional roles based on job responsibilities outside of their primary role.

**Will other managers be able to approve another team's time sheets?**

Yes - A manager can delegate timesheet approval for their team to another manager for temporary situations such as an absence.

**If an employee is gone on timesheet day, can we access their timesheet?**

Yes - A manager or HRA can access an employee's timesheet.

**Can we add an extra reviewer before managers for timesheets?**

No - However, reports may be run to review timesheet information prior to approval.

**External System Integrations**

**What will Kronos integration and transfer of timekeeping look like?**

Employees who currently use the Kronos timekeeping system will continue to enter their time worked using Kronos. However, absence requests will be entered and approved in Workday. Any adjustments to timesheets will be performed in Workday and timesheets will be approved in Workday.

**Are there API interfaces for other specialized time management systems used at specific agencies?**

No - There are only interfaces for Kronos, LPS, and Unanet.

## Time Entry and Approval

### **Will employees who use external systems such as Kronos need to enter time in Workday?**

No - Employees who enter time in an external system such as Kronos that will pass time to Workday should *not* enter time in Workday.

### **Do salaried Employees need to submit timesheets?**

Salaried employees do not need to fill out a timesheet unless needed per agency requirement, for entering Work Reporting Codes (WRC), or other conditions are met. Please see the employee [Smart Guide](#) for step-by-step instructions for using WRCs.

### **What is the definition of an "exempt employee," and are they able to record actual hours worked?**

An exempt employee, generally refers to a salaried employee who is exempt from the Fair Labor Standards Act (FLSA) and does not qualify for "variable" time, such as overtime or comp time. These employees are not required to complete a timesheet unless needed per agency requirements, for entering Work Reporting Codes, or other conditions are met. If salaried/FLSA-exempt employees record actual hours worked, they will be paid for the hours entered up to 80 hours. Employees can look at the "Compensation" tab of their worker profile to see if they are considered hourly or salaried.

### **When is the deadline for employees to submit timesheets, each pay period?**

Timesheets should be submitted and approved by close of business the Friday after the last day of the pay period.

### **Does flex time need to be approved by a manager through Workday? Example: An employee scheduled for eight-hour days wants to work six hours one day and 10 hours the next. Does the employee just enter different scheduled hours without management approval in the system?**

The manager must still approve the time and internal policy will determine whether that approval comes before or after an employee enters the time.

### **Is there an opportunity to enter teleworking days?**

No - There is no distinction between remote or on-site time for hours worked in Workday.

### **Is time entry still completed every two weeks in Workday?**

Yes - Employees may enter time throughout the two weeks, but at a minimum it will be entered every two weeks. Follow your agency's policy for when to submit time.

### **\*Updated\* How do you manage the part-time employees who work four days on/eight days off and their hours aren't consistent in each of those shifts? They also work holidays, etc.**

Employees who do not have a routine shift can have a more "open" schedule which allows them to enter hours at any point. It's important to note that the schedule doesn't impact when hours can be entered on the timesheet, but it will impact time off requests and what days/number of time off hours they can request.

### **Can a department choose to require timesheets for all of their employees, including FLSA-exempt?**

A department can require an FLSA-exempt employee to submit a timesheet, but it is not required for them to be paid.

**Can I edit my time after it's been approved?**

Yes - You can edit approved time but your time submission will have to go through the approval process again.

**Can I submit time via the Workday mobile application?**

Yes.

**Will temp/seasonal workers have to submit time?**

Yes - Managers or HR Partners can also do this on their behalf if needed.

**Is there any period when I cannot enter time?**

There is a Time Period Lockout from Payroll Mondays at 9 pm - Wednesday 6 am. Workers and Managers will not be able to access their timesheet to enter time or make changes during this time. This lockout is the same as previous time entry practices, but it will be visible in Workday.

**How does shift differential work in Workday? How do I enter time for a shift that starts one day and ends on the next?**

Enter the total hours worked on each day to capture the full shift. This would require ending the hours at midnight and starting the next day's work at midnight. For example, if you worked 8pm to 6am, you would add hours on the first day indicating 8pm-12am, then add hours the following day indicating 12am-6am. Be sure to select the applicable shift time entry code to be paid shift differential for the hours. If shift time entry code is not an option, contact your HRA to make sure your shift designation is accurate.

**How can I view the status of my time submission?**

Navigate to the Archive tab of your Workday Inbox to view prior time submissions. Check the status in the Process History tab.

**How does Holiday time work in Workday?**

Holiday time will automatically appear on the timesheet for salaried employees. For hourly employees, holiday time will appear once paid time has been recorded for the scheduled day before and after a holiday. You will receive holiday pay even if the holiday falls on a day off.

For full-time employees, holiday entitlement hours will be equal to 8 hours, or the number of hours scheduled on the holiday, whichever is greater. If the holiday falls on a scheduled day off the employee will receive 8 hours. For example, an employee who is scheduled to work 10 hours on a holiday will receive 10 hours of holiday pay.

If you work on a holiday or the holiday falls on a scheduled day off, you can choose to bank the holiday entitlement hours instead of being paid. If you work on a holiday you must record the hours using the applicable Holiday - Worked Hours time entry code. Workday will automatically generate a time block to pay the premium portion of the holiday hours worked, but the employee can add a time block for Holiday - Comp Time Earned to comp the premium hours instead.

**Do I need to clock in via Workday?**

No - You just need to enter how many hours worked before the pay period ends.

### **Do I still need to enter time in HRIS?**

No - You will only enter time in Workday. Some agencies may still utilize other time keeping systems.

## Overtime and Comp Time

### **How do I submit overtime?**

Enter all hours worked and your overtime hours will automatically be calculated by Workday.

### **In Workday, do Employees have to select the choice for comp time for each occurrence?**

Yes, in Workday, employees eligible for comp time need to make the selection on their timesheet when they want to comp any overtime hours.

### **Can you give an overview of comp time and how to do it in WD? When comp time is "added" (Thurs for example), what is the difference from OT?**

Overtime hours calculated by Workday will automatically be paid. You can then click on the Thursday and add a Comp Time time block for up to the amount of overtime hours. Overtime hours will show in the weekly hours summary.

## Training

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### **What Workday training is available for State employees?**

A variety of training materials and resources have been created for Employees, Managers, and Human Resources personnel. The *Workday Foundations* eLearning module provides an overview of the Workday system and is required for all Executive Branch employees. Recorded webinars and *Workday Foundations* are available in the [DAS LMS](#). Smart Guides, Job Aids, and video snippets are posted on the [WorkSmart website](#) training pages.

### **Are there Workday user guides?**

Step-by-step Job Aids, Smart Guides, and additional resources for many business processes are all posted in the [Training Catalog](#) on the WorkSmart website. There are also [Tips & Tricks](#) on the Wanda WorkSmart webpage. Contact [WorkSmartTraining@iowa.gov](mailto:WorkSmartTraining@iowa.gov) with any training-related questions.