Employee Guide

This guide provides step by step navigation for an employee to successfully utilize Workday.
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Questions: hrconnect@taylorcorp.com or 1-877-252-9861
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Navigation

The following topics outline various worklets, reports, and tasks within Workday that are available to employees. In Workday, data can be entered using “tasks” and viewed using “reports.” The Workday Home Page displays worklets that provide access to these tasks and reports.

Logging In

Workday is accessed using your Employee ID and Password. There are 3 ways to access Workday: Compass, Mobile or by URL. See the instructions below on how to login using each of those methods.

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<tr>
<td>1. From Compass, select Workday from the My Tools section.</td>
<td>1. From your device App Store enter and select Workday from the search results.</td>
<td>1. Open your web browser (Chrome, Internet Explorer, etc.).</td>
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<td>2. Enter your Username (employee id) and Password.</td>
<td>2. Tap Get and Install.</td>
<td>2. Enter the appropriate URL into the web address bar:</td>
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<tr>
<td></td>
<td>4. Accept the Privacy Policy &amp; Terms and Conditions.</td>
<td>Rembrandt: myworkday.rembrandtinc.com</td>
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<td></td>
<td>5. Tap Let’s get started.</td>
<td>Taylor: myworkday.taylor.com</td>
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<td></td>
<td>6. Enter taylor in the What Company do you work for box.</td>
<td>3. Enter your Username (employee id) and Temp Password.</td>
</tr>
<tr>
<td></td>
<td>7. Enter your Username (employee id) and Password.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>8. Create a custom 4-digit pin and select Save.</td>
<td></td>
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If you cannot remember your password, select the Forgot Password link and enter your username (employee id). You will be prompted to answer your security questions. If you are unable to do so, contact HRConnect for additional assistance.
Home Page

When you first sign in to Workday your Home Page displays. The following image shows the different areas to utilize as you navigate the Workday home Page.

1. **Company Logo** – Click at any time to return to the home Page.
2. **Global Search Bar** – Search for tasks, reports or employees.
3. **Notifications, Inbox & My Profile** – Use these Icons to access your notifications, Workday inbox or your personal profile.
4. **Settings Menu** – Review and reorganize your current worklets.
5. **Announcements** – Check here often to see current organizational announcements.
6. **Worklets** – You will find your current worklets displayed. By selecting an worklet, you will see different tasks that can be completed.
7. **Inbox** – Here you will find tasks or action items that you need to review and complete. This is different from your Outlook Inbox and should be checked often.

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**Mobile:** The Mobile User-Experience now closely mirrors the desktop user experience. On your mobile device you can easily get to important tasks, announcements, and your most frequently used applications. It is important to note that not all tasks can be done from the mobile application.

**Tip:** At any time, select the logo in the top left corner of Workday to return to the home page. You can also use the front and back browser buttons.
Using Search

Workday makes it easy to search for people, tasks, reports, and business data using the Search Field.

To find a worker:
1. Type their name into the Search field and press **Enter**.
2. From the search results, click **People** to filter the results to only display workers in your organization. Search categories are used to filter your search for faster, more accurate results.

**Tip:** Searches find exact matches. If you misspell the search text, you will likely not see any results. You can shorten words to find more matches or use longer search terms to improve the accuracy and reduce the time to return results. Searching prefixes restrict the search results to a particular type of workday object. To see a list of all search prefixes available to you, enter a question mark (?) in the search field.

Using Find Pages

In addition to the search field, there are Find Pages where you can use filters to narrow down the results. For example, use the Find Workers Report to search for employees and other workers by city, skillset, cost center, etc.

You can customize your faceted search in a variety of ways, including:
- **Boolean Search** – (marketing OR branding) AND manager
- **Phrase Search** – "marketing manager"
- **Exact Match** – specificmail@gmail.com

These faceted searches can then be saved for later use. When the search results provide what you’re looking for, you can either initiate an action using the object’s Related Actions or click the link to see more information.
Profile Icon

The Profile Icon contains links to the Home Page, My Account, and Favorites, to name a few.

Updating Account Preferences

In Workday, you can edit a variety of features on your account, including languages, search functionality, workflows, and notification preferences.

From the Home Page:

1. Click your Profile Icon > My Account > Change Preferences.
2. Change any of the items available. Items that are available to be updated will have a drop down box.
3. Click OK, then click Done.

Change Your Password

From the Home Page:

1. Click your Profile Icon > My Account > Change Password.
2. Enter your current password.
3. Enter your new password twice.
4. Click OK.

Mobile: To change your password from your mobile device, tap the profile Icon and tap change password. Then follow the prompts to update.
**View the Organizational Chart**

Workday provides a chart of your organization’s hierarchy. From the Home Page:

1. Click your **Profile Icon > View Profile**.
2. Click the **Team button**. Your Org Chart includes information about your team, HR, and your manager’s manager.
3. Click the names in the top right corner to navigate through your management chain. You can also use the pull-down menu in the top left to view your org chart with or without open positions. To return, select the logo in the top left corner of the page.

**Mobile:** Using your mobile device, you can view the org chart. The org chart helps you identify where you and others fit into the overall structure of your organization. It displays your position within the department, as well as the positions of your teammates. Within the org chart, you can navigate the structure of your department and company by tapping on individuals or groups. Swipe up or down to navigate through the company hierarchy.

**View Your Department**

Workday displays the reporting structure of your department. This can help you understand your place within the organization.

From the Home Page:

1. Click your **Profile Icon > View Profile**.
2. Click the **Job Tab**.
3. Click the **Management Chain** sub tab. Information about your management chain displays.
**View Your History**

Workday displays your job history in the organization.

From the Home Page:

1. Click the **Job Tab**.
2. Click the **Worker History** sub tab. All of your history within Workday displays.

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**Add or Change Your Contact Information**

Your profile Page displays information about you, including your location, phone number, and job details.

From the home Page:

1. Click your **Profile Icon > View Profile**. Your Worker Profile Page displays.
2. Click the **Contact Tab**. The Contact sub tab is selected.
3. Click **Edit** to update any of your contact information. Within each section click the **Edit** Icon to change existing information or click **Add** to add new information. You can also click within a field to edit.
4. Click **Submit**.

*Mobile:* To update your profile information in mobile, go to **Org Chart > Select your name > Select the actions button > Select Personal Data**. You can then choose what information you would like to update and edit as needed.
All of the actions below will start from your profile.

**Add or Change Your Emergency Contacts**
1. Click on Personal Information.
2. Click the Contact Tab.
3. Click the Emergency Contacts sub tab.
4. Click Add or Edit. Enter or modify your emergency contacts.
5. Click Submit.

**Tip:** You can add multiple emergency contacts in Workday. In the Emergency Contact field, scroll to the bottom to find an area to add alternate emergency contacts.

**Add or Change Your Personal Information**
1. Click on Personal Information.
2. Click the Personal Tab.
3. Click Edit. Enter or modify your personal information.
4. Click Submit.

**Review Your Identity Paperwork**
1. Click on Personal Information.
2. Click the Personal Tab.
3. Click the IDs sub tab.
4. Click the Documents sub tab.
Add or Change Your Photo

1. Click Actions > Personal Data > Change My Photo.
2. Click the Select Files Button to locate and upload your image, or drag and drop your image directly into the Attachments Section. You can crop and adjust the image by dragging the white corners to the desired specifications. The portion of the image within the unshaded circle represents how your photo will look on your Profile Page.
3. Click Ok and Submit.

Note: The supported file formats include .png, .jpg, and .gif.

Add and View Your Social Networks

1. Click Actions > Personal Data > Social Networks.
2. Click Add Social Network Account to add a new one, or Edit to change an existing network. You can maintain up to four networks.
3. Enter the social network and user name or web address you want to add. You can only add one account for each social network.
4. Click Ok and Done.

Change Your Preferred Name

If you choose, your preferred name will display within Workday instead of your legal name.

1. Click your Actions Button.
2. Select Personal Data > Change My Preferred Name.
3. Uncheck Use Legal Name as Preferred Name.
4. Enter your new information.
5. Click Submit and Done.
**Change Your Legal Name**

1. Click your Actions Button.
2. Select Personal Data > Change My Legal Name.
3. Enter your new information, including any required information.
4. Attach documentation to support name change.
5. Click Submit.
6. Click To Do to submit proof of your name change or Done to submit later.
7. Click Done.

**Mobile:** You are able to update your personal information from mobile. To do so, in your mobile app go to Org Chart > Select your name > Select the actions button > Select Personal Data. You can then choose what information you would like to update and edit as needed.

**Tip:** If you want your preferred name to match your legal name after a legal name change, you must complete the preferred name change process as well.

**View Your Inbox**

1. Click the Inbox near your Profile Icon.
2. Click the Actions Tab to view your tasks, approvals, and to dos.
3. Click the Archive Tab to access the status of any tasks in which you have been involved.
Worklets

When you first log in to Workday you will see the standard worklets displayed. Additional worklets may be available to be added to your Workday homepage, you can also reorder the worklets.

From your Home Page:

1. Click the **Settings Icon** in the upper-right corner. The Configure Worklets Page displays.
2. Click the **Add Row Icon** to add a new worklet.
3. Click the **Prompt Icon** to select from the list of existing worklets.
4. Click the **Remove Row Icon** to remove an worklet from the dashboard.
5. Click the **Move Row Up arrow** or **Move Row Down arrow** to reorder the worklets on the Page. To move an worklet to the first or last position, use the **Move Row to Top** or **Move Row to Bottom** arrows.
6. Click **Ok and Done**.

Mobile: To view your inbox from your mobile device, select the inbox tray from your mobile home page.
Error & Alert Messages

Error and Alert Messages display in red and can be clicked on to view error explanations. They typically identify a specific field(s) where information is missing, entered incorrectly, or in conflict with a rule established by your organization. Errors prevent you from completing a task until the error is fixed.

Alerts notify you of potential problems on a Page, but do not prevent the task from being completed. Alerts also display the location of missing or problematic information within the task, report, or business process.

Actions Button

Related Actions display next to an object when they can be used to access other relevant actions. For example, the Related Actions next to your name accesses tasks, reports, and data related to your worker record (like viewing or changing your benefits). In Workday, there are multiple ways to get to the same tasks, reports, or data. Most of the actions available through Related Actions are also available through worklets or the search bar. Three common types of Related Actions can be seen in the following images:

- When hovering your cursor next to a business object or link.
- In the header of your worker profile.
- While viewing tasks.

Note: As an option, you can detach the menu from the Related Actions Icon by clicking and dragging the Icon at the top of the Available Actions menu.
Benefits

During the annual open enrollment process, new employees that qualify or existing employees with a qualifying event, employees will be able to enroll or update their benefit elections. Use the table below to align the number of points found from your Bravo account to the medical plan option.

Notes to consider when enrolling in benefits:
1. Adding beneficiaries to the Change Beneficiary area only adds the name to the list of available people to attach to the basic life plan.
2. Employees who have supplemental life insurance do not name a separate beneficiary for that plan – all beneficiary detail is attached to the basic life plan and applies to all employee life insurance.
3. Supplemental spouse/child life plans do not get a beneficiary – the employee is the automatic beneficiary.
4. When adding beneficiaries to the life insurance plan, they need to click the three dots/lines to get the list of names available to attach as beneficiary. This helpful hint may apply to many other areas of the system until people get accustomed to seeing that symbol and understand the functionality behind it.
Enrolling in Benefits

When enrolling in benefits, there are multiple sections to complete. At the top of the benefit election page, the steps are identified to see where you are in the enrollment process.

From your Workday Inbox:

1. Click the Benefit task. The task name may differ depending on time of benefit enrollment.
2. Elect or Waive your offered health, dental and vision coverage. Be sure to scroll through the page to view all available options.
3. Click Continue.
4. The next step displays. If you elected an HSA plan in step 1, you are eligible to contribute to the HSA account plan. If eligible, elect or waive the additional contribution. If you did not elect an HSA plan in step 1, you are not eligible and can select Continue.
5. Next, elect or waive the available spending account plans for dependencies. Click Continue.
6. Elect or waive each of the life insurance plans available. The basic life insurance is provided at no cost to you and is already elected on your behalf. Be sure to scroll down to see all options. Click Continue.
7. If applicable, elect or waive the available 401K options. Click Continue.
8. Add/Update the beneficiary information for your elections. Click the + to add a beneficiary.
9. Click the beneficiary prompt. If there are no beneficiaries listed, click Create to add one. You can also add a trust. Complete all of the required beneficiary information and click Continue.
10. Add the Primary or Contingent percentages. Click Continue.
11. Elect or waive any of the additional benefit elections shown. Click Continue.
13. Click Submit.
**Viewing Benefits**

At any time you can view your benefit elections from the Benefit Worklet.

From the Benefit Worklet:

1. Click **Benefit Elections** under view. All previously enrolled benefits are displayed.

**Changing Benefits**

From the Benefit Worklet:

1. Click **Benefits** under change.
2. Select a **Benefit Event Type**.
3. Enter the **Benefit Event Date**.
4. Add any supporting documentation, if applicable.
5. Click **Submit**.
6. A new page displays, select **Open** to begin changing your current benefits.
7. Once all benefits have been updated, click **Done**.
Adding Beneficiaries

From the Benefit Worklet:

1. Click **Beneficiaries** under change.
2. Select **Add**.
3. Select Existing Dependent or Emergency Contact, New Person, or New Trust.
4. Add/Update all required fields.
5. Click **Submit** and then click **Done**.

Tip: You can add multiple beneficiaries in Workday. In the beneficiary field, click **Add** to add another beneficiary. Follow the steps above for the additional beneficiary.

Enrolling in Benefits on Mobile

Now you can enroll in benefits using your mobile device. Just like from the desktop app, you will receive a task in your Workday Inbox. You can only modify/add dependents and beneficiaries on mobile during open enrollment. If a change is needed to your dependents or beneficiaries outside of open enrollment, you must complete those steps from the Workday Desktop worklet.

From your Inbox:

1. Click the **Benefit** task. The task name may differ depending on time of benefit enrollment.
2. Click **Let’s Get Started** and answer any questions displayed.
3. Select the category you want to begin enrolling in. Within each category, **select your enrollment choice or select waive** if you do not want coverage.
4. Click **Edit** to modify your coverage, if needed.
Add or Modify Dependents on Mobile

If you elect or modify a benefit plan during open enrollment, you can add dependents or modify your existing dependents.
1. Select your new benefit election or click the **Edit** link for an existing benefit election.
2. Click **Add New Dependent**, select an existing dependent, or deselect an existing dependent. Complete all required information.
3. Click **Save**.

Add or Modify Beneficiaries on Mobile

From the Insurance & Retirement section, select each category to open your enrollment options.
1. For current enrollments, click **Edit** or **View** to modify your beneficiaries. For new enrollments, select the **Benefit** option.
2. View and modify your primary beneficiary, secondary beneficiary, and the percentage of benefits for each. Your primary beneficiary and contingent beneficiaries must add up to 100%.
3. Click **Add Beneficiaries** to add a new beneficiary. To add a new beneficiary click **Add New Beneficiary** or **Add New Trust**. To remove a beneficiary, unselect the checkbox next to that beneficiary.
4. Click **Close** and enter the % of benefits for each beneficiary.
5. Click **Save**.

Complete Your Benefit Enrollment on Mobile

Once all of your elections have been made, you must submit and complete your enrollment.

1. Click **Checkout**.
2. Scroll down to review your benefit elections and upload any required documentation in the Attachments section.
3. Select the **I Agree** checkbox to confirm your electronic signature.
4. Click **Submit**. A confirmation page displays.
5. Click **Close** to return to your Inbox.
Compensation

As an employee you may want to view your compensation in Workday. You can view your compensation at any time through your Workday profile. Use the below explanations when viewing your compensation.

1. **Total Salary & Allowances** – Annualized combined total of the plan assignments; see additional detail below in 3.

2. **Total Base Pay** – Annualized pay.

3. **Plan Assignments** – Various compensation plans that are assigned to you. This will show Hourly or Salary primarily, but also an allowance if you are eligible. In the Assignment column you will see the frequency of each and the value.
Onboarding

If you are a new employee, you will receive several tasks in your Workday inbox to complete as part of your onboarding.

Edit Government IDs

All employees are required to add their government id (SSN) upon hire.

From your Workday Inbox:

1. Click the Edit Government IDs task.
2. Under Proposed IDs, click the + to add your National ID.
3. Select your Country, ID Type, and enter your ID #, Issued Date and Expiration date if applicable.
4. Add any additional IDs and click Submit.

Update your Personal Information

From your Workday Inbox:

1. Click the Personal Information Update task.
2. Update your personal information. Be sure to scroll down to see all sections. Click the pencil to edit.
3. Click Submit to save the edits.
**Review Documents**

From your Workday Inbox:

1. Click the **Review Documents** task.
2. Review each document attached, you may need to scroll down to see all. Click **I Agree**.
3. Click **Submit**.

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**Payment Election Enrollment**

From your Workday Inbox:

1. Click the **Payment Election Enrollment Event** task.
2. Select how you would like to receive your regular payments and bonus payments (Direct Deposit or Check).
3. Enter in your **Account Information** (Checking or Savings).
4. Click **Ok**.
Federal Withholding Elections

From your Workday Inbox:

1. Click the **Complete Federal Withholding Elections** task.
2. Under the W-4 Data, complete any applicable information.
3. Click **I Agree**.
4. Click **Submit**.

Complete Form I-9

From your Workday Inbox:

1. Click the **Complete Form I-9** task.
2. Under Section 1, complete any applicable information. Some information will pre-populate based on tasks already completed.
3. Under Signature of Employee, click **I Agree**.
4. Click **Submit**.
Absence

The absence worklet allows employees to request or correct and absence, as well as return from a leave of absence.

View Absence Balance

From the Absence Worklet:

1. Click Absence Balance from the view column.
2. Choose the Date you wish to view your available balance.
3. Click Ok. Your available balance as of the date chosen displays.

Tip: To see your available balance for future absence requests, select the future date of the expected absence.

View Scheduled Absences

From the Absence worklet:

1. Click My Absence under the View section. A report of your Absence Requests displays.

Mobile: To view and request time off from your mobile device, select the Time Off Application and then select the View & Request Time Off button. Anything already scheduled will display, if you are requesting time off, select the dates you are requesting and then select the Request Time Off button.
Request an Absence

From the Absence worklet:

1. Click **Request Absence** under the Request section.
2. Click on the **day(s)** you wish to take time away or click and drag to select multiple days. Click on a selected day to deselect it.

   **Tip:** Click the Select Date Range button to enter an extended date range. This is useful when entering an absence request that might extend into a different month or over a long period.

3. Click **Request Absence**. The number of days you requested dynamically displays on the button to help confirm your request.
4. Select the **Type of Absence** requested. Your options will include both Time Away (PTO) and Leave of Absence types.
5. Once the type of absence is selected, additional options display. Select the type of time or leave you are requesting.
6. Click **Next**.
7. The Quantity per Day will default to your daily scheduled hours. To change the amount of hours requested, click **Edit Quantity per Day**. Enter the desired Quantity per Day amount and any needed Comments, or to update all quantities to the same amount, enter the desired amount in the Update all Quantities field and click **Done**.
8. Attach any appropriate supporting documents by dragging them to the Attachments field or clicking Select files.
9. Click **Submit**. The request is sent to your manager for approval. To view status of your request, select **My Absence** from the absence worklet.
Change a Requested Absence

From the Absence worklet:

1. Click **Correct My Absence**.
2. Click the **Time Request** on the calendar.
3. Select the **day(s)** you want to correct. If your request has not been approved, the only option you have is to cancel the request.
4. Once a day is selected the type and quantity per day fields will auto-fill. Adjust the **type** or **quantity per day** as needed. If different changes are needed for each day, select each day individually to make the necessary edits.
5. Click **Submit**.

**Note:** To correct an approved leave of absence request, you will need to notify HRConnect.

Cancel a Requested Absence

Submitted time off requests that have not yet been approved can be canceled. Once approved, you must correct the request to cancel it.

From the Absence worklet:

1. Click **Correct My Absence**.
2. Click the **Time Request** on the calendar.
3. Click **Cancel** if this request has not been approved or select the **remove** icon if the request has been approved.
4. Enter a comment as to why you are canceling. This is a required field for a cancellation.
5. Click **Submit**, then **Done**.
Leave of Absences

In Workday you will be able to select the type of leave you will be requesting. Provided is a list of the different types of leave available. While there may be several kinds of leave listed, only those that you are eligible for will appear in your drop down list.

- Family Medical Leave Act (FMLA) – available after 12 months of service and 1250 hours.
- Continuous leave – out all day/every day for a set period of time
- Intermittent leave – out as needed for a condition.
- Reduced schedule – working a set/known reduced schedule for a period of time.

FMLA is available for your own serious health condition or for the serious health condition of a family member (defined as spouse, minor child or parent). All of these a ‘general’ guidelines – for example, if a child is handicapped, the minor limit doesn’t apply. If a grandparent or someone else served as your ‘parent figure’ in childhood, they are covered. A few other exceptions, so preface this with a ‘generally speaking’. FMLA is also available for pregnancy, birth and bonding.

There may also be a medical leave of absence available to those who don’t qualify for FMLA or who exhausted all FMLA eligibility and still cannot return to work. This is a continuous leave of absence.

- Personal leave of absence – no medical reason. Need time off for various reasons such as home country visit, extended travel or family commitments. Needs company approval – not guaranteed. This is also a continuous leave of absence.
- ADA – Americans with Disability Act – sometimes there is a need to accommodate a different schedule, duty or some other component of their job.

Military leave – these are governed by federal regulation and those in the military understand them. Covers their training or deployment and also provides Exigency leave for family members.
Cancel Leave of Absence

Submitted Leave of Absence requests that have not yet been approved can be canceled. Once approved, you must correct the request to cancel it.

From the Absence worklet:

1. Click Correct My Absence.
2. Click the Leave of Absence Entry on the calendar.
3. Click the Absence Event’s Related Actions.
5. Enter a Comment. This step is required for a cancelation.
6. Click Submit, then Done.
Pay

The Pay worklet contains links to payroll-related tasks and information. Use this worklet to view or update:

**Withholding Elections:** View withholding information on the State Elections tab and View/Modify your Federal Elections.

**Payment Elections:** Distribute payroll and expense payments between different bank accounts (checking or savings), and specify the payment method, such as check or direct deposit.

**Recent Payslips:** View and print payslips or change your payslip printing election. You may view payslips for any previous period when the data is provided.

### View Your Withholding Deductions

From the Pay worklet:

1. Click **Withholding Elections**.
2. Your current withholding elections displays.
3. View your Federal Elections or click the **State Elections**, **Local Elections**, or **Tax Allocations** tabs to review your status.

### Change Your Withholding Deductions

From the Pay worklet:

1. Click **Withholding Elections**. Your current withholding elections displays.
2. Click the **Update button** in the tab you wish to change to edit your current elections.
3. Your information auto-populates. Click **Ok** to continue.
4. Modify the information using the available prompts. Be sure to complete all required fields, these are noted by a red asterisk. Select the **I Agree** Checkbox.
5. Click **Ok**.
Add a Direct Deposit Account

From your Profile:

1. Click Pay.
2. The Payment Elections tab displays. Click Add.
3. Select the Account Type and enter the Bank Name, Routing Transit Number, and Account Number. You can also enter a nickname for this account if needed.
4. Click Ok. Once the account has been added, you may use it to make payment elections.

Manage Your Payment Elections

From your Profile:

1. Click Pay.
2. The Payment Elections tab displays. All current accounts are shown, click Edit to update an account or Remove to delete an account. An account can only be deleted if it is no longer used as a payment election.
3. If editing, make the necessary adjustments.
4. Click Ok.

Note: Change the amount or percent that goes to the account or the account that receives the balance of payments for the pay type. If the “Balance” option is used when having multiple direct deposit accounts, then the account the balance is going to needs to be the last one listed.
View and Print Payslips
From the Pay Worklet:
1. Click Payslips. Previous payslips display.
2. Click the View button next to a payslip to view it. Or you click Print to see a PDF copy of your payslip.

Note: If print is selected, a notification will display stating your request is being processed and you will be notified later. Once processed, a notification will display in the top right of your Workday page.

View Pay History
From the Pay Worklet:
1. View the Pay History dashboard.
2. Click View More and select the date range you wish to view.
3. Click Ok.
Time

The time worklet allows employees to track and manage their time. Employees should clock in and out using the time clock kiosks within their facility or the time clock in Workday. Check with your manager if you are unsure of how to clock in and out.

Enter Time

Continue to use physical time clocks. If a clock punch is missed or a timesheet requires correction for any reason, it may take at least 1 business day before feedback sent to the time clock about hours worked is updated.

Workday Web Clock

From the Time Worklet:

1. Select Check In.
2. The check in box displays. Confirm the details are correct and add any additional comments if applicable.
3. Click Ok and then Done. You have successfully checked in.

When you are ready to check out for break/lunch/day, complete these steps From the Time Worklet:

1. Select Check Out.
2. Select Reason.
3. Confirm the details are correct and add any additional comments if applicable.
4. Click Ok and then Done. You have successfully checked out.
View My Schedule

From the Time Worklet:

1. Under the view column, select **My Schedule**.
2. A monthly view displays. You can change the view from the view drop down to display a Day or Week view. To see a specific day of the month, select that day.

**Note:** Regardless of lunch duration, if an employee works a 5X8, 4X10, 3X12 schedule, their schedule will show as if they are scheduled for 8, 10, or 12 hours.

View Time Clock History

From the Time Worklet:

1. Under the view column, select **Time Clock History**.
2. The current week displays. Select the **Previous Week** or **Next Week buttons** to view those entries. Select **View My Calendar** to view the entries in a calendar grid format.
Expense Management

Expense reports are submitted for business-related costs like travel expenses that are incurred on a company card or as an out of pocket expense, such as mileage. Use the Expense worklet to track expenses, upload receipts, and submit expense reports.

When possible - credit card, out of pocket expenses and mileage reimbursement should be entered on one expense report.

**Best Practice** is to submit an expense report within 2 weeks of the date of the transaction and at a minimum of the last week of each month.

Create a New Expense Report via Web

1. Click **Create Expense Report** button under **Actions**. **Create New Expense Report** will default in.
2. Enter **Memo**, this field is required and this is the name of your expense report. **NOTE:** This was previously at the top of the expense report, and now it is on the create expense report page.
3. Confirm all other required fields that default in.
4. If you have a corporate credit card, select the **credit card transactions** to be included in the expense report from the table under **Credit Card Transactions**. **NOTE:** It will take 3-5 business days for a credit card transaction to post into workday.
5. Click **Ok**. This creates your expense report.

**Note:** Account Category or Project can be selected from the additional worktags field on any expense report line. 
If you are unsure of coding please contact a member of your finance team.
6. Errors will generate upon creation, these errors will clear once all required information is entered on each line. *To check if an error has cleared click into another expense line.*

7. Complete the credit card expense lines by selecting expense items, and completing all required fields. *Hotels and Meals require itemization.* Additional instructions on itemizing is below in the guide.

8. Upload any required documentation to expense report lines. *Hotels, and Car Rental expenses require receipts* and will hard stop you from submitting your expense report. *All other expense items will generate an alert* when a receipt is not attached to the line.

9. Refer below in this guide to Adding Expense items for entering Out of Pocket Expenses such as mileage.

10. Verify the total amounts at the top under the blue line.

<table>
<thead>
<tr>
<th>Status</th>
<th>Personal</th>
<th>Company Paid</th>
<th>Reimbursement</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>0.00 USD</td>
<td>542.86 USD</td>
<td>0.00 USD</td>
<td>542.86 USD</td>
</tr>
</tbody>
</table>

a. **Personal** – If any line or part of a line is marked personal amount will show here. Any amount here will be deducted from your paycheck.

b. **Company Paid** – Total credit card expenses on expense report will show here.

c. **Reimbursement** – Total of any out of pocket expenses entered. This will be paid out in a separate deposit to the account designated in your expense payment election. **NOTE: It will deduct the personal amount from the total out of pocket to show the amount you will be reimbursed. This may show negative, if the amount you have marked personal is greater than the out of pocket amount.**

d. **Total** - Total of expense report

11. Click **Submit** if you are completed with your expense report.
Itemizing Expenses
Hotel and Meals require expense itemization. Itemization can be done on any expense item if the cost needs to be broken out to multiple cost centers.
1. Under Item Details you can find Itemization. You can add Non-Recurring Charges or Recurring Charges depending on expense item.

2. Hotel –
   a. Non-Recurring Charges would be for meals at the hotel that were charged to the room or anything else that is not a standard charge.
   b. Recurring Charges/Daily Charges will need to be entered for Hotel Daily Rate & Tax amount. An additional line will need to be entered if there is daily parking fees, associated with the stay.

   a. Meals without tips enter the total amount on the non-recurring charges window, and click done.
b. *Meals with tips* enter the meal subtotal amount on the total amount line that appears and add an additional line. Change expense item to **Meal Tip**, enter tip amount in total amount line. Remaining amount should be $0.00/$XX.XX at the top of window, click **done**.
Adding Expense Report Lines

Once your expense report has been created you can add out of pocket expenses and additional Credit Card Transactions.

1. Click **Add** in the upper left corner.
2. Select the appropriate item from drop down
   a. **Credit Card Transactions** – Select to add additional credit card charges to an expense report
   b. **Quick Expense** – Don’t use this feature.
   c. **New Expense** – Select to add Out of Pocket Expenses such as mileage, this opens a new expense report line. *NOTE: This is only used for reimbursements for out of pocket expenses.*
3. Complete all the required fields. *Reminder* Hotels and Meals require itemization. Additional instructions on itemizing are above.
   a. **Mileage** – Select expense item of **mileage**, update the **quantity** field to total number of miles from origination to destination. If a city is not listed in Workday send an email to the **ER Team** with the city and state to have it added.
4. Upload any required documentation to expense report lines.
Receipt Upload

Itemized receipts are required for all expenses. If you don’t have a receipt, the system will generate an orange alert, but you will still be able to submit with that alert. If you are missing a hotel or car rental receipt, you must contact the hotel and or car rental place for a copy of the receipt. The system will not allow you to submit your expense report if you are missing a receipt on a hotel or car rental.

1. From Mobile Application Receipt Capture – Quickly capture an image of the receipt from your camera on your phone and save it to photos. Or capture the image within the Workday app on your phone.
   a) Camera Capture Outside of App
      i. Capture image of receipt and save to photos
      ii. Open expense worklet in mobile application, select **Scan Expense with Camera**
      iii. Select the **picture icon** in the bottom right corner of the screen
      iv. Select receipt images from photos – You can select multiple receipt images
      v. Click done/checkmark and receipts will scan and be available in the Linked Quick Expense on the Web
   b) Within Workday App
      i. Open expense worklet in mobile application, select **Scan Expense with Camera**
      ii. Capture image of receipt – If you have more than one receipt to capture select next receipt to capture another
      iii. Click done/checkmark and receipts will scan and be available in the Linked Quick Expense on the Web

2. Receipt attachment via Web
   i. Receipts From Files on Computer
   ii. On each expense item under Attachments from File, click Select files or Drag and drop the file to this location
   iii. Files will automatically upload
   b) Receipts From Mobile Application
      i. Locate the Linked Quick Expenses
      ii. Select matching receipt from mobile application

3. Deletion of Duplicate Receipts in Mobile
   a) Open expenses Worklet on mobile device
   b) Select orange dot in upper right corner of Expenses
   c) Swipe line with receipt to the left to delete image
**View an Expense Information**

From the Expenses worklet:

1. Click the **Expense Reports** button under View. You have the option of filtering your expense reports by status or date.
2. Click **Expense Transactions** button under View. You have the option of filtering your expense transactions by status or date.
3. Click **Payment Elections** button under View. To view your expense direct deposit payment elections.
4. Expense Reports listed under recent can be clicked on to view. Hovering on the right side of the button will display an actions icon.

**Icons on Expense Report Lines**

- Receipt is attached
- Credit Card Expense
- Expense is itemized