



Managing My Team Job Aid

Workday Training
Manual for Managers



Welcome to Managing My Team through Workday. The [MANAGING MY TEAM MANUAL](#) is designed to help access and update important information regarding your team. This manual is organized into five sections:

Section

A

MANAGER TECHNIQUES

- Become familiar with manager-related applications
- Learn more about your inbox and its functions

Section

B

COMPENSATION

- Make compensation changes to your team, including one-time payments and merit increases
- Approve compensation changes your direct reports submit for their team

Section

C

CHANGES TO MY TEAM

- Process Termination
- D • Start a job change for a team member, such as promotions or switching departments

Section

D

TIME TRACKING

- Approve or modify your team's time and absences

Section

E

RECRUITING

- Create and post job requisitions
- Schedule interviews, generate offers, and hire a new team member
- Learn more about your new hire's onboarding process

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Introduction

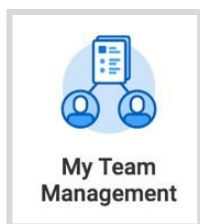
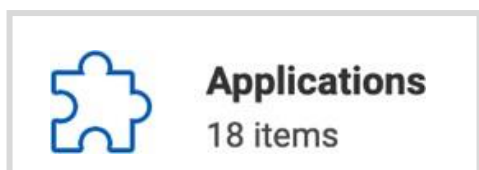
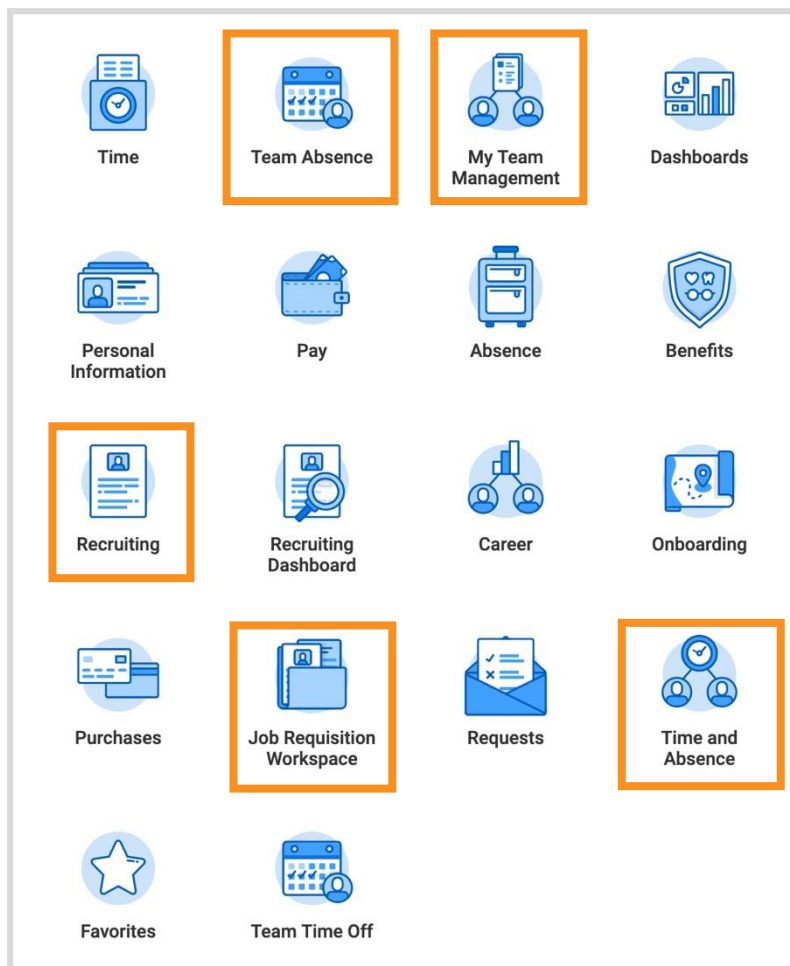
This section of the **MANAGING MY TEAM** manual will introduce key Workday areas that are important for **GOODWILL MANAGERS** to become familiar with. The following pages will navigate around manager-related applications and inbox functionalities. For Workday techniques related to non-management features, please refer to the **MY WORKDAY** manual.

Applications

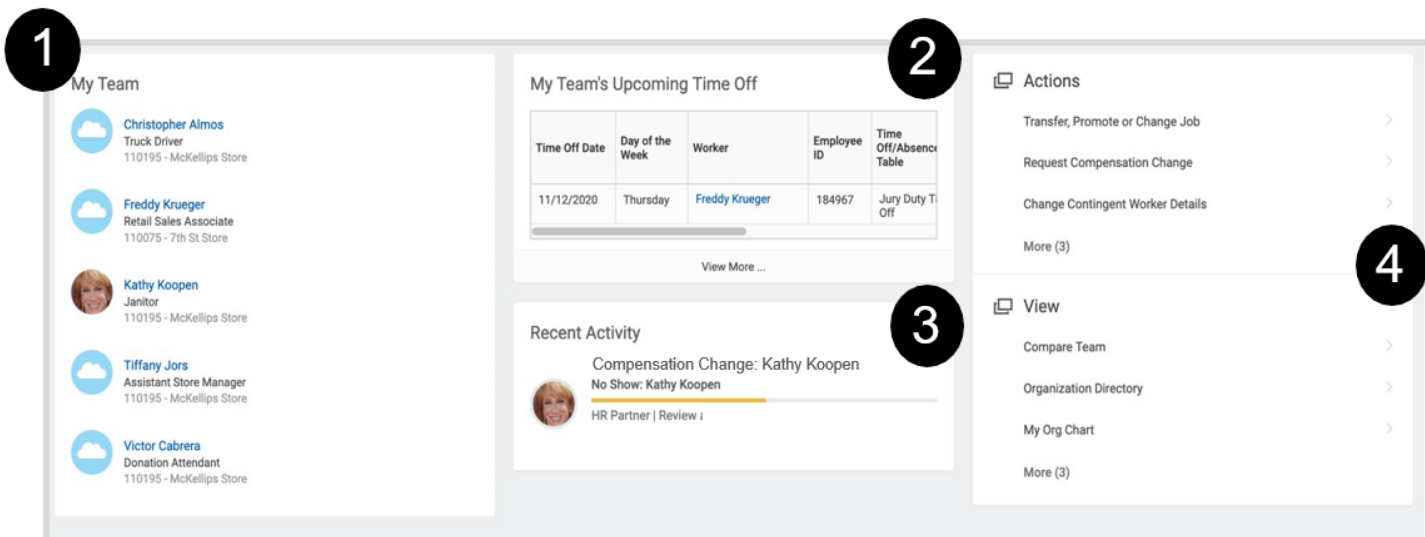
Depending on your management role, you will be pre-loaded with a set of permanent and customizable applications. For more information on how to customize applications, refer to the My Workday Manual.

The picture to the right indicates the four applications you will be interacting with the most in this manual.

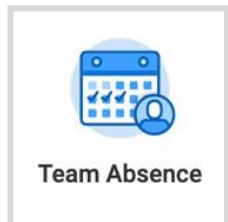
Continue to the next page for a brief overview on each application.



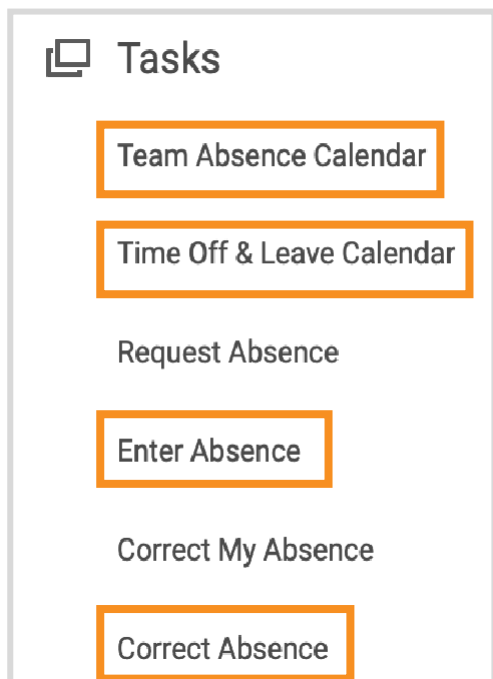
The My Team Management application is your primary location that features everyone who reports to you. You can see a snapshot of who sits on your team, any recent activity you made to a team member, and much more! Just like your applications, you can customize certain displays by simply clicking the gear icon in the top right corner.



1. On the left, you can see a list of your direct reports, including their title and location. If you hover over their name, you will notice the **Actions** icon. From here, you can access actions to initiate for that team member such as starting a job change or viewing their compensation.
2. Workday gives you a snapshot of upcoming events happening to your team members. Some examples of these are vacation, sick time, or leave of absence.
3. Any recent actions you have made to your team will appear here. This snapshot will also tell you where this activity is at in the business process.
4. For quick access, you can easily act on one of your team members by clicking one of the tasks listed under **Actions**. You can also view things like your organizational chart (and other teams' organizational charts) under **View**.



The Team Absence application is your primary location that features a number of actions you can take regarding your teams' absences.

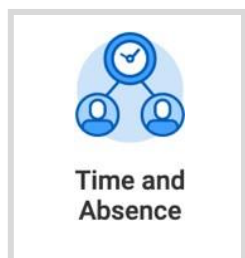


Team Absence Calendar: This task allows you to select one or multiple team members, and will display a calendar of all absences (sick, vacation, etc.).

Time Off & Leave Calendar: This task will take you directly to a calendar of all your team members' time off and leave.

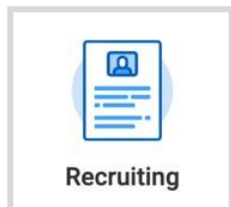
Enter Absence: This task will allow you to enter an absence for your team member. (See table of contents to be directed to these Steps.)

Correct Absence: This task will allow you to modify an absence for your team member. (See table of contents to be directed to these Steps.)

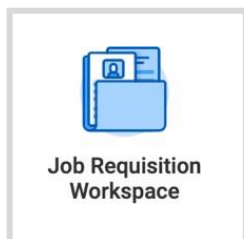


The Time and Absence application is your primary location that features a number of actions and viewings regarding your teams' worked hours (if applicable) and absences. Some of the features on this page are:

- Upcoming Time Off
- Team Scheduled Worked Hours (if applicable)
- Absences submitted, but not approved yet by you



The Recruiting application is your primary location for recruiting a new team member to your team! This application houses quick actions and viewings, such as posting a job requisition or viewing all of your posted requisitions. Not all managers will have this application configured on their homepage, but you can quickly add it yourself (see Steps in My Workday manual). Use the images below to help you better understand the



The Job Requisition Workspace application is a quicker route to access all of your posted job requisitions. Use the images below to help you better understand the workspace, candidates, and overall features.

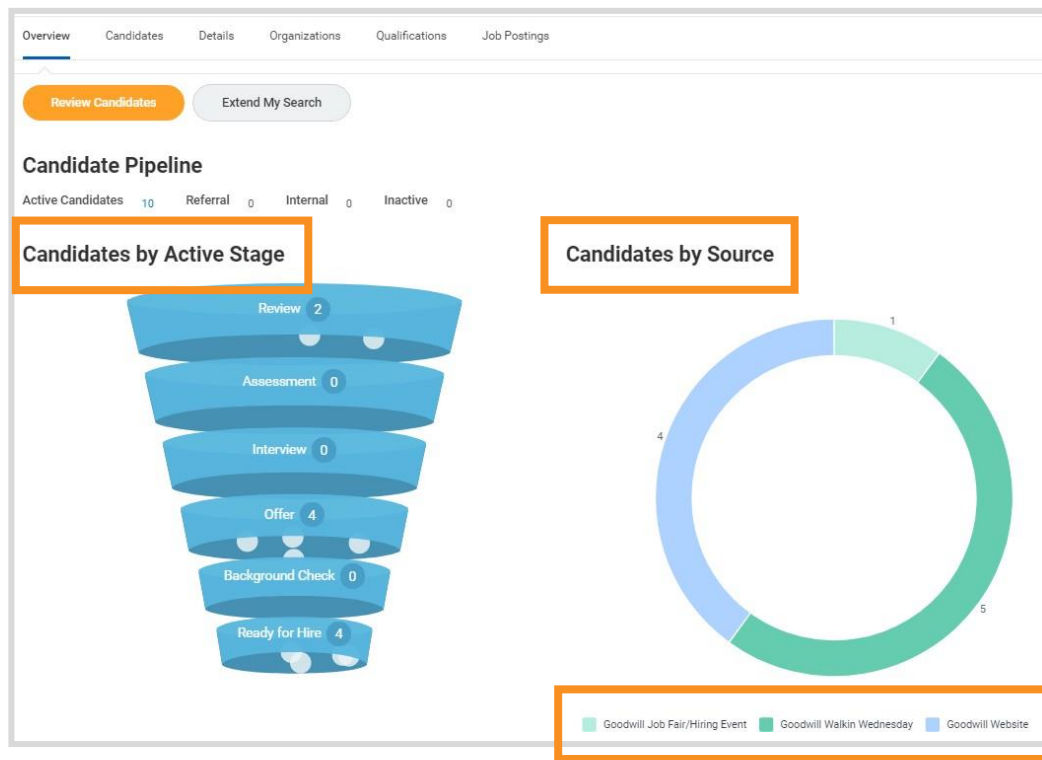
Job Requisition Workspace								
Show All		By Hiring Manager	By Primary Location					
Job Requisition	Status	Hiring Manager	Review	Assessment	Interview	Offer	Background Check	Ready for Hire
R475 Retail Merchandise Processor	Posted 6 days ago	Justin Brewer Assistant Store Manager	3	—	—	1	—	—
R478 Retail Merchandise Processor	Posted 6 days ago	Michael Daehler Assistant Store Manager	2	—	—	1	—	1
R479 Retail Merchandise Processor	Posted 6 days ago	Nestor Aguirre Assistant Store Manager	1	—	—	1	—	1
R357 Assistant Store Manager	Open	Teresa Szafnyk Retail Store Manager	1	—	—	2	—	3

This workspace will display:

- All of your job requisitions
- Their status
- Who the hiring manager is
- How many candidates are in review, interview, assessment (if applicable) offer, background check, ready for hire

You can also filter your requisitions by clicking the tabs “By Hiring Manager” or “By Primary Location”. To work inside a specific job requisition, click on the hyperlink associated to the requisition.

Once inside a requisition, you are given an overview of the candidates who have applied. You can see the stage they are in and where they were sourced from (hiring fairs, walk-in's, website, etc.)



If you click on the Candidates tab, a detailed list of applicants appears to the left. Each name is hyperlinked, and will direct you to that candidates' profile. To the right of their name, you can see what stage they are in. For example, Review is the first stage in the process, which means the candidate has not been moved into an interview, or declined, yet.

6 items

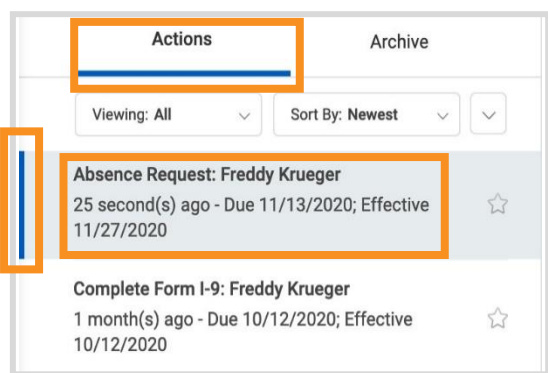
<input type="checkbox"/>	Job Application	Step / Disposition	Awaiting Me	Awaiting Action
<input type="checkbox"/>	Gustave Flaubert (C191)	Completion		
<input type="checkbox"/>	Marie Curie (C243)	Offer	<button>Offer Decision</button>	6
<input type="checkbox"/>	Willia Knight (C192)	Offer		5
<input type="checkbox"/>	Joyce Carol Oates (C189)	Offer		1
<input type="checkbox"/>	Eleanor Roosevelt (C245)	Review	<button>Review</button>	6
<input type="checkbox"/>	Dorothea Lange (C244)	Review	<button>Review</button>	6

Inbox Functionalities

Every team member at Goodwill will have access to their own Workday inbox. A manager’s inbox will require more attention and use – almost on a daily basis depending on your team.

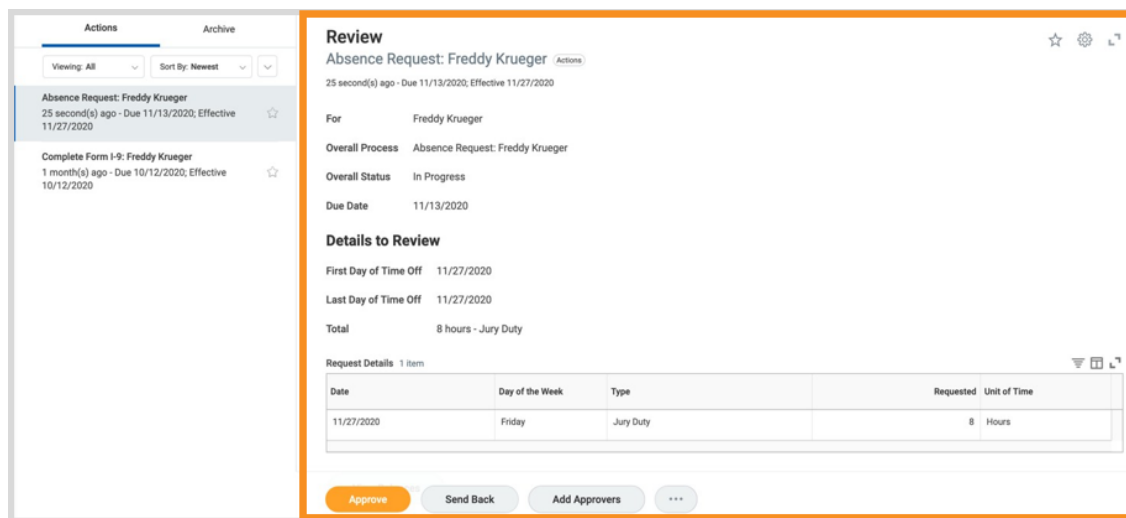
As a manager, you will be receiving approvals, and other tasks to act on, that could begin to compile very quickly. This section will give you an overview of your inbox, as well as Steps to help you set up filters to maximize efficiency.

INBOX OVERVIEW



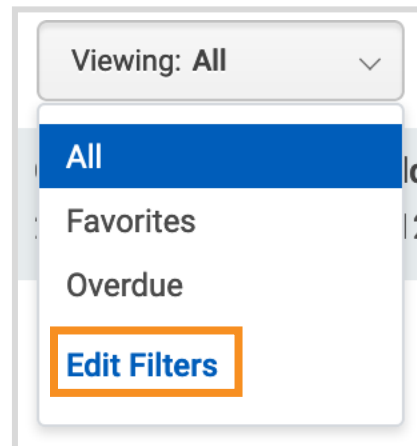
- The Actions tab will display all of your tasks needing your attention.
- Each task will display a title to let you know what action will be required from you. In some cases, you will see a name associated with the title. You will also notice that each task will have the time it was sent, and a due date if necessary.

- The blue bar indicates which task is currently being displayed to the right of your page.
- Anytime you complete a task, your inbox will automatically go to the next task



HOW TO SET UP INBOX FILTERS

1. Click on the dropdown menu for Viewing: All.
2. Click Edit Filters.
3. Click Create Inbox Filter.
4. Create a description for the filter.
5. Select either for all Business Processes for generic tasks or Business Process Types for something more specific.
6. Click into the Task(s) dropdown menu and search a task you want your inbox to filter (example, approvals).
7. Click OK.
8. Click Done.



Inbox Filter (empty)

Description * Enter Time Approvals

Maximum Row Limit 200



View Definition

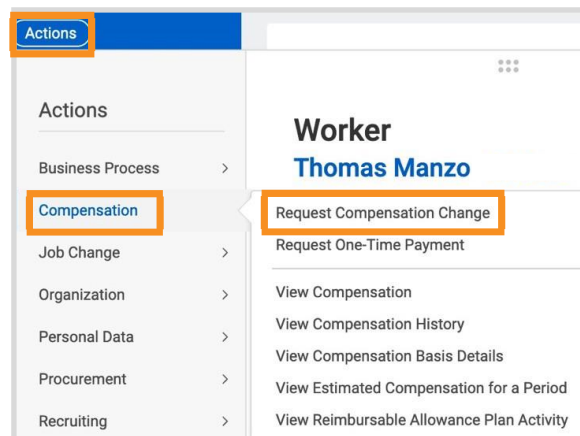
* For all Business Processes


Business Process Type(s) × Enter Time ☰

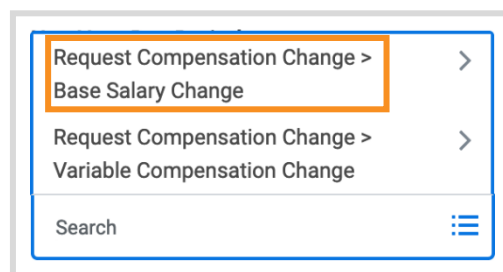
Task(s) × Approvals ☰

Compensation Change

- Click on the  My Team Management application.
 -  **Note:** If you are making a compensation change to someone who is not your direct report, search for their name in the search bar instead. Skip to Step 3.
- Select the team member you wish to make the change to.
- From their profile, click on the Actions button > Compensation > Request Compensation Change.




- Choose an effective date (the date for the next pay period will auto-populate).
- Click OK and then fill out the following sections on the next page by using the  Edit and Save icon
- Effective Date & Reason
 - Make sure the effective date is correct
 - Click into the Reason box > Base Salary Change.
From there, select a reason for compensation change.



 **Note:** Base Salary Change reason descriptions:


- Correction: To correct a previous pay rate entry or classification.
- Equity Adjustment: Compensation adjustments as directed by Human Resources, after an equity analysis has been run.
- Job Reclassification: Compensation adjustments as directed by Human Resources should the job be reclassified.
- Merit: Compensation increase given to team members, usually at the completion of a performance review.

7. Skip Employee Visibility Date.

 **Note:** Total Base Pay and Guidelines will pre-populate. These are not editable.

8. Use the table below to choose the next Steps based on your needs (cont. next page):

<p>Compensation Change for Hourly</p>	<p>From the Hourly section, make your compensation change by editing the amount field. After saving, you will notice blue dots next to the new change.</p>	<p>Hourly</p> <p>Assignment Details 12.80 USD Hourly</p> <p>Plan Name Hourly Plan</p> <p>Effective Date 05/12/2022</p>
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<p>Compensation Change for Salary</p>	<ol style="list-style-type: none"> From the Salary section of the page, edit the amount by putting in the percentage change. Example: enter the number two for a 2% increase. You will notice the amount auto populate. After saving, you will notice blue dots next to the new change. 	<p>Amount * 37,613.24</p> <p>Amount Change 737.51</p> <p>Percent Change 2</p> <p>Salary</p> <p>Assignment Details ● 37,613.24 USD Annual was 36,875.73 USD Annual</p> <p>Plan Name Salary Plan</p> <p>Effective Date ● 11/08/2020 was 07/05/2020</p>
<p>Switching from Hourly to Salary (or Salary to Hourly)</p>	<ol style="list-style-type: none"> From the Hourly (or Salary) section of the page, click the  remove icon to drop the current amount. You will notice a red X next to what was removed. Click add to the base pay you would like to switch over to. (Switching to Salary will require you to select a Compensation plan > Base Salary. You will also need to select an annual frequency.) Enter in the new amount. 	<p>Hourly</p> <p>Assignment Details × 12.00 USD Hourly removed</p> <p>Salary</p> <p>Add</p> <p>Amount * 39,000.00</p> <p>Frequency * × Annual</p>

Note: Increases of 15% or more will be routed to the HR Compensation team for review.

9. Skip Allowance, Merit, and Bonus.
10. Click Submit.
11. The Up Next page displays. Click Done.

Approving Compensation Change

1. Click on your inbox located on the homepage.
2. Click on the Compensation Change task and locate the request that you wish to view.

Review
 Compensation Change: Freddy Krueger - Retail Sales Associate Actions
 23 hour(s) ago - Due 10/15/2020; Effective 10/12/2020

For Retail Sales Associate - Freddy Krueger

Overall Process Compensation Change: Freddy Krueger - Retail Sales Associate

Overall Status In Progress

Due Date 10/20/2020

3. Review and verify all details. If you are reviewing and a pop-up appears, you will need to exit the new page to go back to the original screen for approval.

Compensation Basis Amount Changes 2 items						
Current			Proposed			
Compensation Basis	Total	% Increase	Amount Increase	Total	Currency	Frequency
Total Base Pay	12.00	2.08%	0.25	12.25	USD	Hourly
Total Salary & Allowances	12.00	2.08%	0.25	12.25	USD	Hourly

Guideline Changes 3 items			
Effective Date	Plan Type	Current Details	Proposed Changes
10/12/2020	Compensation Package	General Compensation Package	
10/12/2020	Grade	S2	
10/12/2020	Grade Profile	S52 Profile 1	

Plan Assignment Changes 1 item				
Effective Date	Plan Type	Plan Name	Current Details	Proposed Change
10/12/2020	Hourly	Hourly Plan	12.00 USD Hourly	12.25 USD Hourly

4. To approve the request, click Approve. If you do not approve this request, click Send back. You will be required to fill out a reason for this decision.

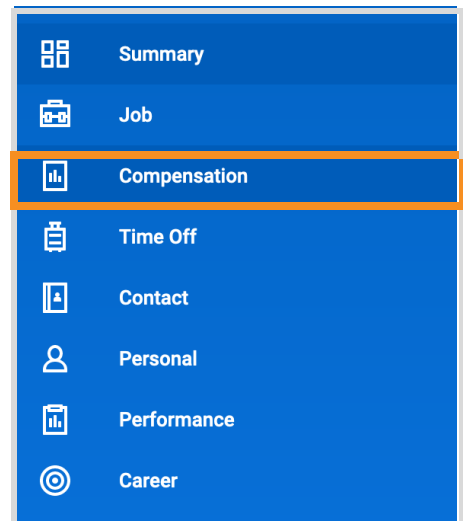
Note: Send Back examples; incorrect amount or incorrect effective date.

5. Click Done.

View Compensation of a Team Member

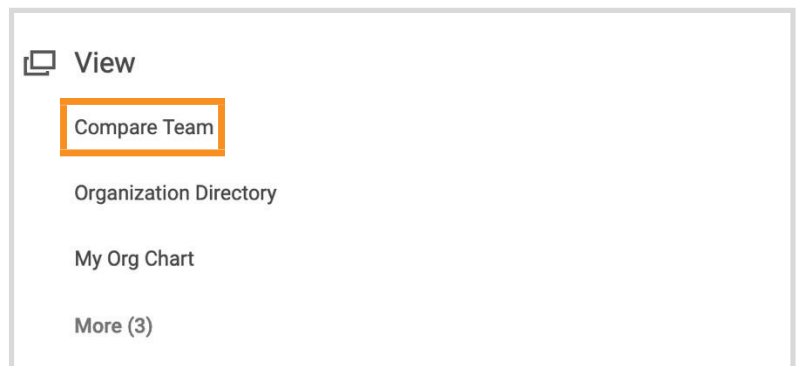
1. Click on the My Team Management application.
2. Select the team member you wish to view.
3. From their profile, click on the Compensation tab.

Compensation		Pay Change History	
Totals 1 item			
	Total Salary & Allowances		Total Base Pay
	12.00		12.00
Compensation			
Compensation Package	General Compensation Package		
Grade	52		
Total Base Pay Range	12.00 - 14.10 - 16.20 USD Hourly		
Company	Goodwill of Central & Northern Arizona		



Compare Compensation of a Team

1. Click on the My Team Management application.
2. Under View, click on Compare Team.
3. Click OK.



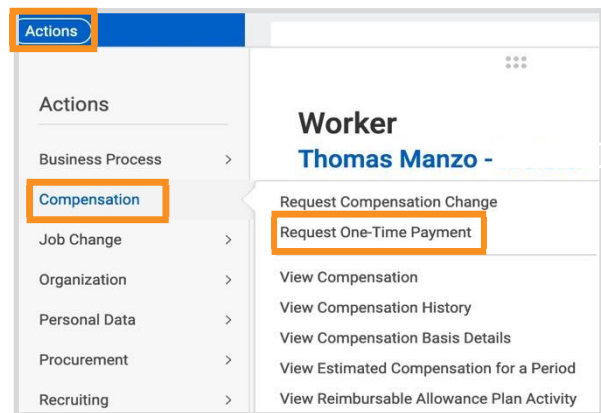
Submit a One-Time Payment

1. Click on my Team Management application.

Note: If you are submitting a one-time payment for someone who is not your direct report, search for their name in the search bar instead. Skip to Step 3.

2. Select the team member you wish to submit the one-time payment for.

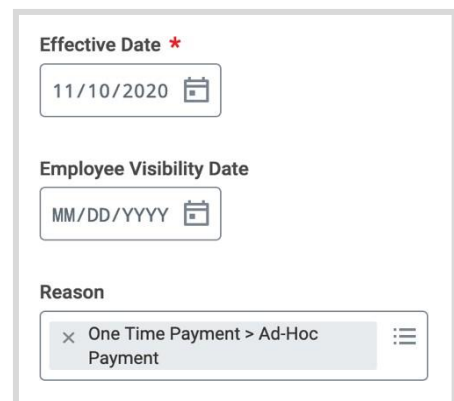
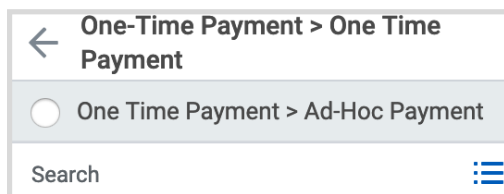
3. From their profile, click on the Actions button > Compensation > Request One-Time Payment.



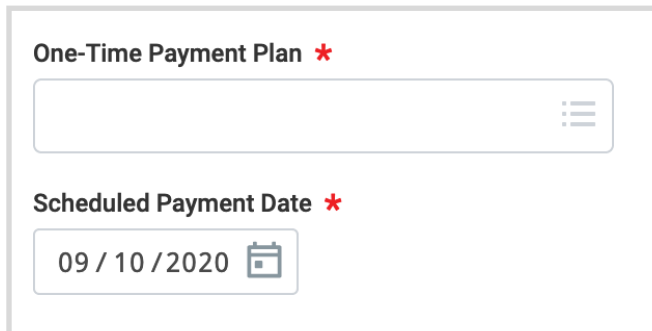
4. Enter the effective date and then click OK.

Note: This can be any date and does not have to align with pay dates.

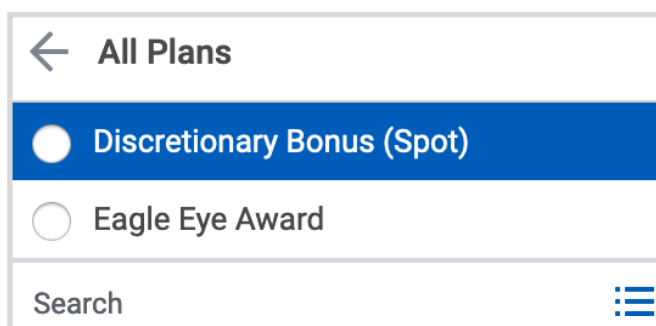
5. Click the Edit icon to add a reason.
6. Select One-Time Payment > Ad-Hoc Payment option.
7. Click the Save icon.




- Click on Add under the One Time Payment box.



- Click inside the One-Time Payment box > All Plans > select either Discretionary Bonus or Eagle Eye Award.



- Enter in the amount.
- Describe the one-time payment reason in the additional information box.
- Click the Save icon.
- Click Submit.
- The Up Next page displays. Click Done

 **Note:** The process of logging found money within LMPS does not change. Eagle-Eye payments are processed in Workday and Asset Protection will approve.

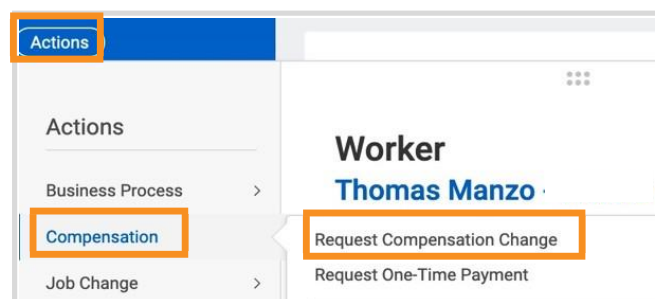
Adding an Allowance for Team Member

1. Click on the My Team Management application.

Note: If you are adding an allowance for someone who is not your direct report, search for their name in the search bar instead. Skip to Step 3.

2. Select the team member you wish to add an allowance for.

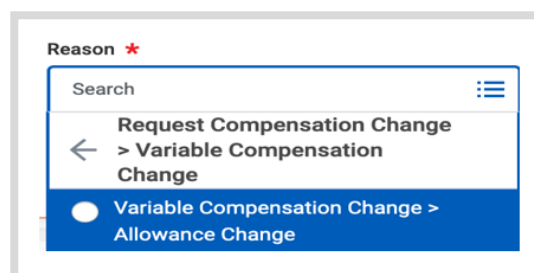
3. From their profile, click on the Actions button > Compensation > Request Compensation Change.



4. Choose an effective date (the date for the next pay period will auto-populate).

5. Click OK.

6. Under Effective Date and Reason, click the Edit icon and then click into the Reason box.

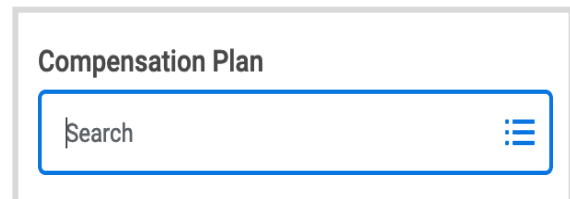


7. Select Variable Compensation Change > Allowance Change. Click the Save icon.

8. Scroll down to the bottom of the page a click Add under the Allowance section.
9. Click into the Compensation Plan box and choose the desired allowance.

 **Note:** Options to select will vary depending on the team member and their eligibility.

10. Enter in your amount. (Cell Phone allowances will pre-populate.)
11. Click the Save icon.
12. Click Submit.
13. The Up Next page appears. Click Done.






Compensation Plan

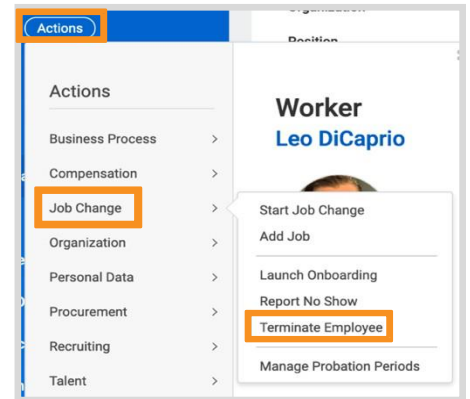
Search

Process a Voluntary Termination


1. Click on the  My Team Management application.


 **Note:** If you are terminating someone who is not a direct report, type their name in the search box. Skip to Step 3.

2. Select the team member.
3. Click on the Actions button > Job Change > Terminate employee.
4. Complete the required fields on the Termination form
Click the  and  icons to edit and save your work.



5. Reason
 - a. Primary Reason – Click the edit icon and then click into the search box.
 - b. Click Voluntary.
 - c. Select the option that best fits the reason for the termination and then click the save icon.
6. Details
 - a. Click the edit icon and select the termination date. The other two dates will auto-fill.


 **Note:** You may need to edit the Last Day of Work date if last day worked is different than the termination date.

 **Note:** Some termination reasons will trigger additional Steps (e.g., terminating someone who is on a leave).

- b. Skip the section, Resignation Date.

7. Skip the section, Regrettable.

8. Eligibility - Optional field.

 **Note:** Comments are committed to the employees record and is considered discoverable. Use good judgement.

Up Next

HR Partner


Manage Business Processes for Worker


Due Date 08/14/2020

9. Comments – Optional field.

10. Attachments – Optional field. Attachment example: resignation letter.

11. Click Submit.

 **Note:** You may view the Details and Process section for greater understanding of the overall process.

 **Details and Process**

For [Leo DiCaprio](#)

Overall Process [Terminate: Leo DiCaprio](#)

Overall Status In Progress


Due Date 08/28/2020

Details Process


[View Details](#)


12. The page Up Next will appear.

13. Click Done.



 **Note:** Team member will receive an Exit Survey in their Workday Inbox.

Process an Involuntary Termination

1. Click on the  My Team Management application.

 **Note:** If the person you are terminating is not a direct report, type their name in the search box. Skip to Step 3.

2. Select the team member.
3. From their profile, click on the Actions button > Job Change > Terminate Employee.

Complete the required fields on the Termination form (Steps 5 – 10). Click the  and  icons to edit and save your work.

4. Reason

- a. Primary Reason – Click the edit icon and then click into the search box.
- b. Click Involuntary.
- c. Select the option that best fits the reason for the termination and then click the save icon.


Reason

Primary Reason *

Involuntary > Theft

5. Details

- a. Click the edit icon and select the termination date. The other two dates will auto-fill.

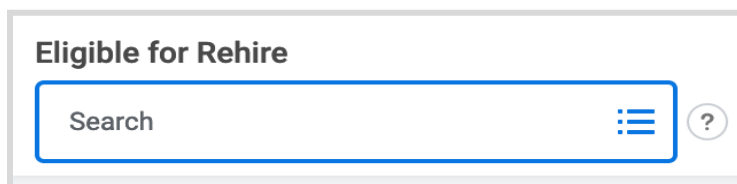
 **Note:** You may need to edit the Last Day of Work date if last day worked is different than the termination date.

- b. Click the save icon.

6. Skip the section, Regrettable.

7. Eligibility – To determine eligibility for rehire, click on the question mark to access additional information.

8. Skip the section, Position Details.



A screenshot of a search box titled "Eligible for Rehire". The search box contains the word "Search" and has a menu icon (three horizontal lines) and a question mark icon to its right.

9. Click Submit


10. The Up Next page will appear.




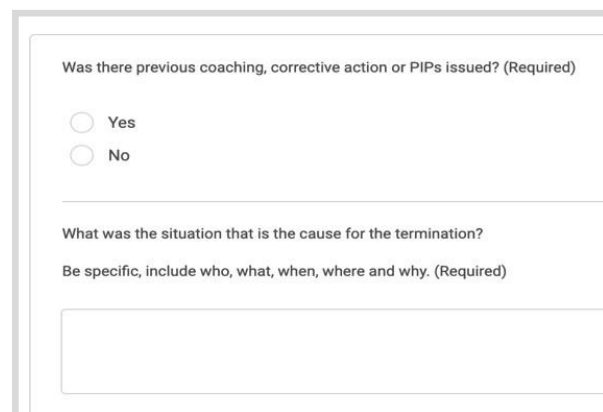
11. Click Complete Questionnaire and answer the required fields on the form (only the direct manager will receive this. You may check your inbox for the questionnaire as well.)

12. Click Submit

13. The Up Next page will appear, which reflects the HR Analyst (HRBP).

 **Note:** HR Analyst may refer the termination to another person within Workday as part of the process.

 **Note:** What was formerly known as RFD (Review for Dismissal) is now done through ITIR.




A screenshot of a questionnaire form. The first question is "Was there previous coaching, corrective action or PIPs issued? (Required)" with radio button options for "Yes" and "No". The second question is "What was the situation that is the cause for the termination? Be specific, include who, what, when, where and why. (Required)" with a text input field below it.


Process a No-Show Termination for New Hire

Please be aware that processing a no-show termination is for **NEW HIRES ONLY** who have not shown up for their first day of work. The following steps cannot be used for team members who have hours logged.

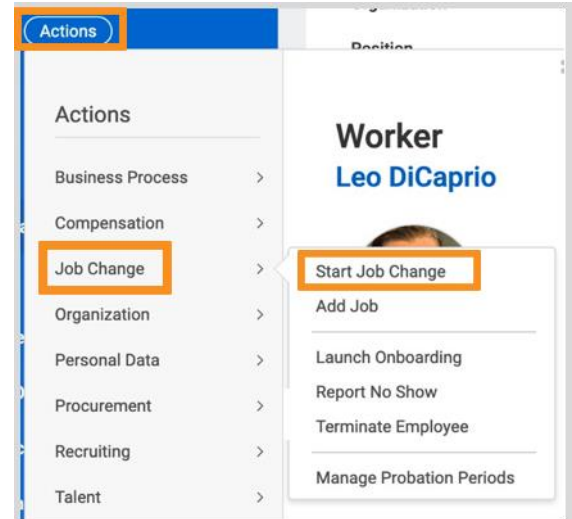
Worker	Kathy Koopen
Position	McKellips Store ASM
Hire Date	07/02/2019
Are you sure this worker is a no show? *	<input type="checkbox"/>
	<input type="text" value="enter your comment"/>


1. Click on the  My Team Management application.
2. Select the team member.
3. From their profile, click on the Actions button > Job Change > Report No Show.
4. Check the box that asks: "Are you sure this worker is a No Show?"
5. Click Submit.
6. The Up Next page will appear.
7. Click Done.

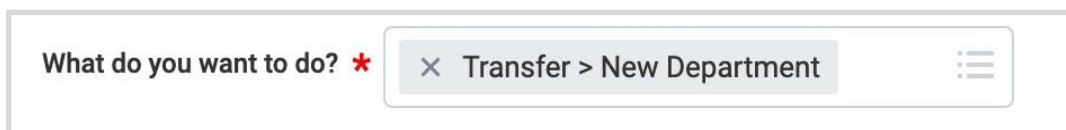
Start a Job Change



 **Note:** If you are making a job change for someone who is not your direct report, type their name in the search field instead. Skip to Step 3.

1. Select the team member.
2. Click on the Actions button > Job Change > Start Job Change.
3. Select the What do you want to do? drop down to select the option most relevant to your needs. Choices you can select are: Full-Time to Part-Time or Part-Time to Full-Time, change Departments, Locations, Managers, or Positions, Promotion, Lateral Move, and Demotion.



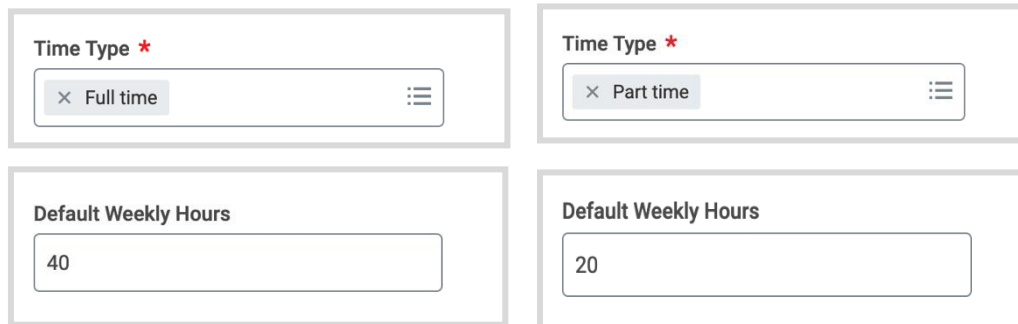
 **Note:** Please be aware of the criteria for promotions and job changes. You can find this listed on the current page.



4. Click OK.
5. Click the orange Start button to begin the process.
6. Under Start, use the  and  icons to edit and save the required changes.

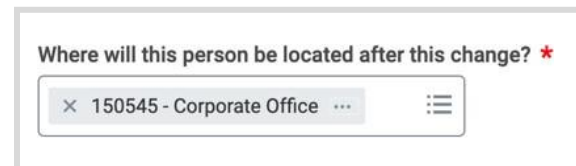
7. Use the following tips to help guide you through the option you selected:

- a. Full-Time to Part-Time (or Part-Time to Full-Time)
 - i. Click inside the Time Type box and make your FT/PT change.
 - ii. For FT to PT, change the Default Weekly Hours to 20.
 - iii. For PT to FT, change the Default Weekly Hours to 40.




b. Department, Location, Manager, Position, Lateral Move, Promotions, Demotions

- i. Under Start Details, begin editing the “Where will this person be located after this change?” field first. Make sure this field represents the location where the team member will be working.
- ii. Next, edit the “Which team will this person be on after this change?” field. Make sure this field represents the team and/or manager the team member will be working with.




iii. The “Who will be the manager after this change?” field will auto-populate.

 **Note:** If the team member is currently on a disciplinary action or PIP, you will see an alert pop up after submitting the job change. The system will allow you to proceed with the change, but please consult with your leader first.

iv. Click the Details and Process arrow and navigate to the Process tab to view the next steps in the Change Job business process. The Status field indicates whether there are any required actions or steps to complete.


v. Click Done.

Approve a Job Change

1. Go to your  inbox.
2. Locate the Job Change Inbox task (title will reflect the option chosen, such as transfer).
3. All Review details will display.
4. While reviewing, please take a close look at the following notes:

Review: Receiving Manager
Transfer: Joe Lianoz Actions

6 day(s) ago - Due 10/02/2020; Effective 09/27/2020

 **Note:** Location Details page: Be sure this section is also changed in the Cost Center and Region section of the form. In addition, scheduled Weekly Hours must reflect 40 hours for FTE. For PT employees, it must reflect 30 hours or less.


Location Details

Location *

- 📍 110188 - Buckhorn Store added
- ✕ 📍 110066 - Thunderbird Square Store removed


Work Space
(empty)

Scheduled Weekly Hours
40


 **Note:** Compensation section, Employee Visibility Date: if you want a date other than the effective date, be sure to change the date here.


Employee Visibility Date

Employee Visibility Date
10/13/2020

 **Note:** Merit section: The 3% is the standard “plan” associated with the position. It is not what the actual change will be.



5. Review all final changes.
6. Click Approve, Send Back, or Deny.
7. Click Submit.
8. Click Done.


 **Note:** If you find something that is incorrect at this stage, click **Send Back** and include comments for the sending manager to correct. Deny will terminate the entire process. Only use Deny for wrong employee, wrong store, etc.


 **Note:** This entire process is the same if you are a manager’s manager. Follow all Steps.

Approving Time for a Team Member


Situation A: Team member who submitted their time.

1. Click on the  Inbox icon.
2. Select the Time Entry task for the team member you want to approve time for.
3. Review the entries before submission. You can click on the  magnify glass to view more details on a specific entry.
4. Click on Approve, Send Back, or Deny.
5. Click Done.


 **Note:** If you choose to send back or deny, you must fill in a reason. This will be sent back to the team member.




 **Note:** This process is the same for Absence (Vacation/Sick) requests, but the inbox task will be titled differently.

Worker **Kathy Koopen**


Daily Totals 3 items 

Date	Type	Hours
Mon, 9/28	Worked Time	8
Tue, 9/29	Worked Time	8
Wed, 9/30	Worked Time	8

Entries to Approve 3 items 

Date	Type	Time Block Reported Quantity	Units	In	Out	Out Reason	Comment	Details
Mon, 9/28	Worked Time	8	Hours	08:00:00 AM	04:00:00 PM	Out	lost badge	
Tue, 9/29	Worked Time	8	Hours	08:30:00 AM	04:30:00 PM	Out	forgot to clock in and out	
Wed, 9/30	Worked Time	8	Hours	08:30:00 AM	04:30:00 PM	Out	lost badge	

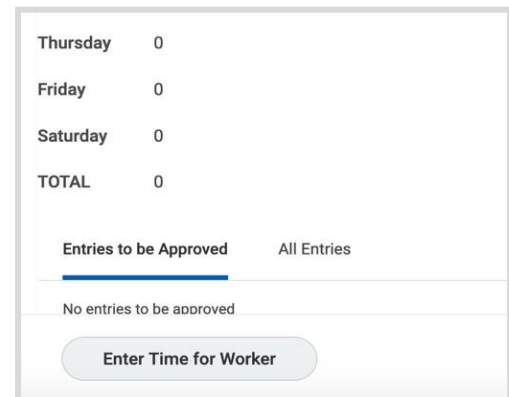
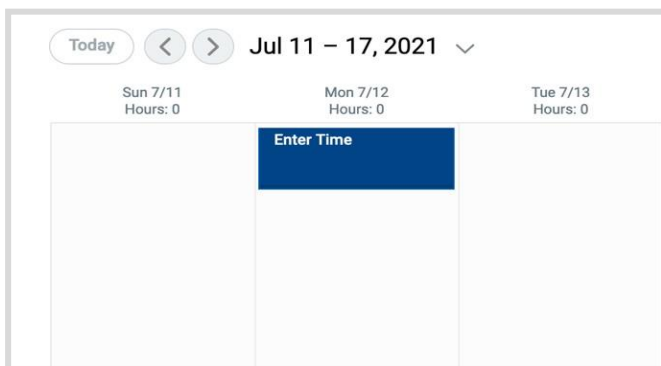
Situation B: Team member who hasn't submitted their time.

1. Click on the  Time and Absence application.
2. Under Tasks, click on Review Time.
3. Click OK.

- You can see which team members have not submitted their time here. Click on the team member you want to enter time for (blue hyperlink).


2 All Workers	---	2 Workers with No Time Entered			
Workers with Time Ready for Approval					
Time Period Summary 2 items					
<input type="checkbox"/>	Worker Name	Unsubmitted Hours	Hours to Approve	Approved Hours	Regular
<input type="checkbox"/>	Edwin Soto	0	0	0	0
<input type="checkbox"/>	John Smith	0	0	0	0

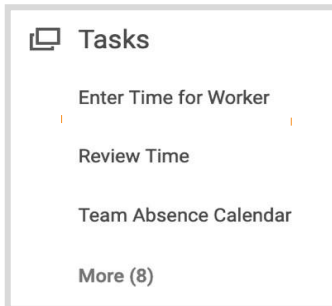
- At the bottom of the page, click Enter Time for Worker.
- From the Enter Time page, click inside the date you want to enter time for.



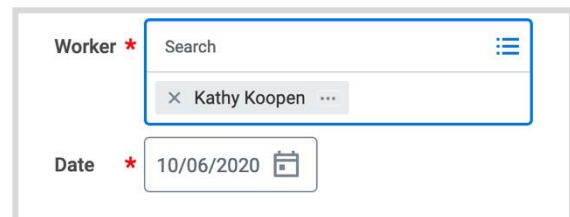
- A pop-up will appear. Fill out the form and then click OK.
- After entering your team member's time, click Review at the bottom right corner. A pop up will appear. Click Submit.

Enter Time for a Team Member

1. Click on the  Time and Absence application.
2. Under Tasks, click on Enter Time for Worker.




3. Click inside the Worker box > My Team > the team member. If this is not for a direct report, type their name in the box and hit enter.

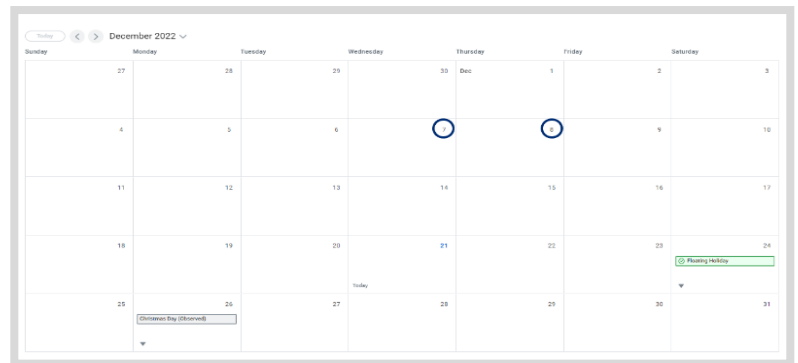


4. Select the date you want to enter time for.
5. Click OK.
6. You will see the date's entire week displayed. Click inside the box of the date you want to enter the time for.
7. A pop-up will appear. Fill out the form and then click OK > Review > Submit.

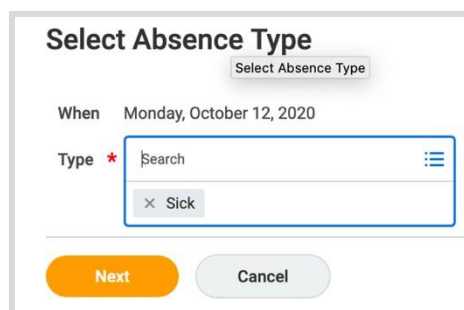
Mon 10/26 Hours: 0	Tue 10/27 Hours: 0	Wed 10/28 Hours: 0

Enter Absence for a Team Member


1. Click on the  Time and Absence application.
2. Under Tasks, click Enter Absence. You may need to first click More to display additional options.
3. Click inside the worker box > My Team > the team member. If this is not for a direct report, type their name in the box and hit enter.
4. Click OK.
5. Select the date(s) on the calendar displayed.




6. At the bottom left, click the orange Request Absence button that displays the number of days you selected.
7. Click inside the Type box and select the type of absence, such as sick, vacation, etc.
8. Click Next.



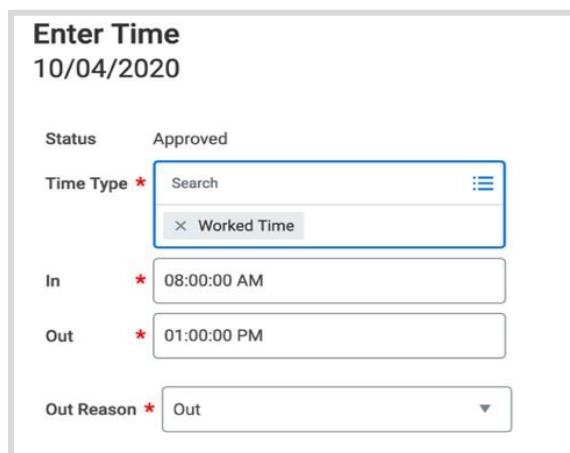
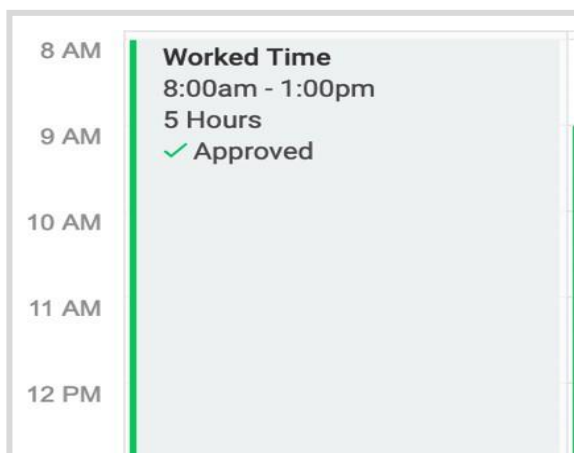
9. Review the request on the next page and then click Submit.

 **Note:** You can split the number of hours used for the absence by clicking on Edit Quantity per Day on the next page.


Modify a Team Member's Time

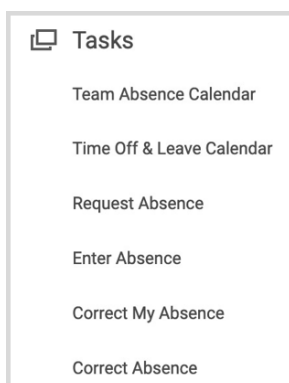
1. Click on the  Time and Absence application.
2. Under Tasks, click on Enter Time for Worker.
3. Click inside the Worker box > My Team > the team member. If this is not for a direct report, type their name in the box and hit enter.
4. Select the date you want to modify the time for.
5. Click OK.
6. Double-click on the time block you wish to change located on the displayed calendar.
7. A pop-up will appear with the details of the entered time. Make your changes here and then click OK > Submit > Submit > Done.

 **Note:** You will need to enter a comment as to why you are making this change.



Modify a Team Member Absence


1. Click on the  Team Absence application.
2. Under Tasks, click More and then Correct Absence.



3. Click into the Worker box > My Team > the team member you want to correct the absence for. If this is not for a direct report, type their name in the box and hit enter.
4. Click OK.
5. Double click on the absence you wish to change located on the displayed calendar.




6. A pop-up will appear. Make the necessary changes and then click Submit.

 **Note:** If you want to completely delete the absence, edit the number of hours to zero.


Create a Job Requisition (Positions Managed by a Manager)

The following Steps will be used for hiring these job positions only:

- Retail/Retail Operation Frontline
- Assistant Store Managers
- Store Managers
- Customer Service Managers

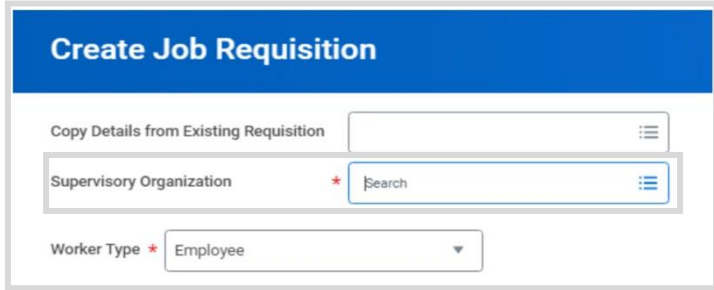
1. Click on the  Recruiting application or type create job requisition into the search bar and skip to Step 3.



2. Under Actions, click Create Job Requisition

 **Note:** If the job requisition you need already exists, you can click on the “Copy Details from Existing Requisition box” and select the one that best fits. When using this option, if your location has moved districts, be sure to check the Organizations section to ensure the Region is correct before submitting. Review the Compensation section to ensure the correct pay rate is displayed.



3. Make sure that the Supervisory Organization reflects the manager that the new team member will report. If it does not, search and change this field.

4. Click OK.



5. From Recruiting Details page, complete the following by using the  and  icons to edit and save:
- Number of openings
 - Replacement For: Optional field.
 - Recruiting Start Date: Do not change.
 - Target End Date: Leave blank.
 - Reason: Select New Position>Budgeted – Backfill
 - Recruiting Instruction: Optional field.
 - Target Hire Date: Select a future date.
 - Referral Details: Leave blank.

6. Click Next.

7. From the Job Details page, complete the following by using the  and  icons to edit and save:

- a. Job Posting Title: This should match the Job Profile title.
- b. Job Profile: Click into the box and search for the position you want to hire for. Make sure this matches your posting title.
- c. Job Description: This will auto-populate based on your selected job profile. Do not change.
- d. Worker Sub-Type: Select Worker Type>Regular.
- e. Time Type: Select either Full Time or Part Time.
- f. Primary Location: Select your location.
- g. Primary Job Location: This will default. Do not change.
- h. Scheduled Weekly Hours: If Full Time, hours will default. If Part-time, you will need to enter 20 hours.


8. From the Link to Evergreen Requisition section, click inside the search box and select the appropriate evergreen for the position.

Worker Sub-Type *
Regular



Time Type *
Part time

Primary Location *
110075 - 7th St Store

Primary Job Posting Location *
7th Street Store (7th St & Thunderbird)



 **Note:** Linking job requisitions to the evergreen also allows you to move candidates from one job requisition to another. For example, if you filled a job requisition but still need to hire when you create a new job requisition, you can move any active candidates from the filled job requisition into the new one as long as they are both linked to the evergreen.

9. Skip the remaining sections and click Next.

10. From the Organization page, complete the following by using the  and  icons to edit and save: Verify all sections. No action is required if all information is correct.

11. Click Next.

12. Skip Attachments and click Next.


13. From the Compensation page, complete the following by using the  and  icons to edit and save:

- a. Salary: Add if the position is a salary position. Skip if hourly.
- b. Hourly: Enter an appropriate rate based on the pay range above.
- c. Bonus (if eligible) and Merit plan will auto-populate for you.

14. Click Next.


15. Assign Roles

- a. Click Add and select Primary Recruiter.
- b. If this is for a management or ROC/Warehouse frontline position, add your region's designated recruiter from the Goodwill Recruiting Team.
- c. If this is a Retail Store Frontline position, add your store management team.
- d. Skip Secondary Recruiter.

 **Note:** Only the Primary and Secondary Recruiter(s) can work inside the requisition. If you are creating a requisition on behalf of the hiring manager and want access to the information, you must put yourself down as a recruiter.


16. Click Next.

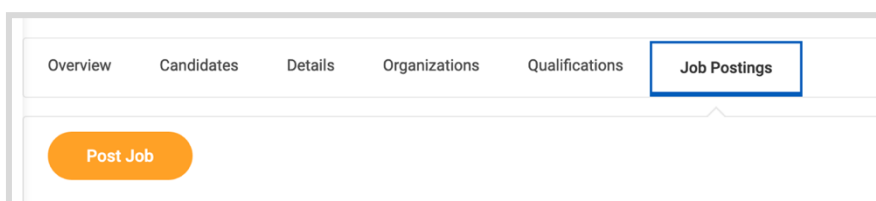
17. Review all details and then click Submit.

 **Note:** If you want to skip to posting the requisition, click on the Open link. Once there, go to the “Post a Job Requisition” process and start at Step 3.



Post a Job Requisition


1. Click on the  Recruiting application, or type post job into the search bar > locate the posting > skip to Step 4.
2. Click on the requisition you want to post under the Recent box.
3. On the next page, click Job Postings and then click Post Job.

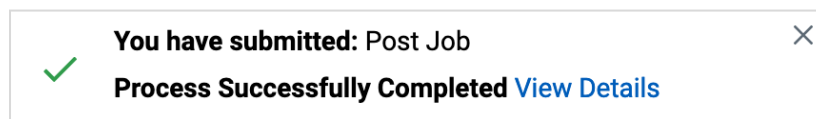



4. Click inside the Job Posting Site. Select All and then select Goodwill AZ/MD & Internal.



5. Click OK.
6. Review the information on the next page and then click Submit.


 **Note:** You can view the job posting details by clicking on the View Details link. See the image below. Please take note of the requisition number attached to the job title.



 **Note:** You can refresh a job requisition by un-posting and re-posting your job requisition. From your job requisition, navigate to the Job Postings section, click on the check box, Un-post, and then Repost. This will refresh your posting on other online job boards (i.e. Indeed, Google Jobs).

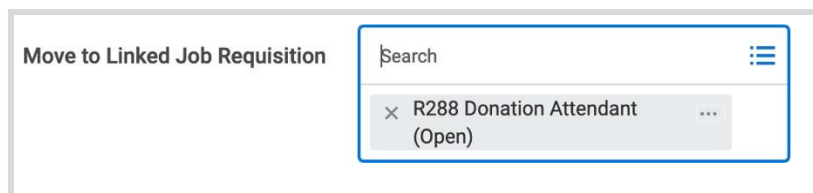
Moving Candidate from the Evergreen

If you are not satisfied with the selection of candidates applying to your posting, you can use these Steps to move other candidates from an evergreen to your requisition.

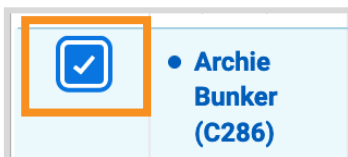
1. Click on  Job Requisition Workspace application and locate your requisition.
2. Once inside your requisition, click on the details tab. At the top, click on the evergreen companywide link.
3. Click Review Candidates. Click on the box next to the candidate you want to move over.

Linked Evergreen Requisition [R3 Donation Attendant \(Companywide\) \(Evergreen\) \(Open\)](#)


4. Click on the three dots at the bottom of the page and then select Move to Linked Job Requisition.




5. Type your requisition number into the search field, or use the filter to find it.




6. Click OK.

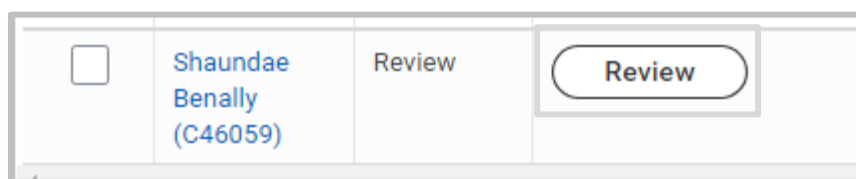
 **Note:** When moving someone from the evergreen job requisitions, it will remove another manager’s access to that candidate. If you do not move forward with the candidate, please move them back into the evergreen job requisition for other managers to review.

Schedule an Interview

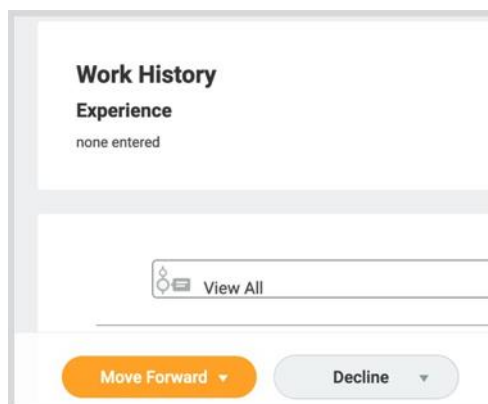
1. Click on the  Job Requisition Workspace application.
2. Click on the job requisition you wish to interview candidates for.


 **Note:** On the requisition page, there are several things you can review (candidate pipeline, internal versus external, etc.)

3. Click on Candidates. This will open up the list of candidates who have applied to your posting. You can see each candidate’s highlights featured in the table displayed.
4. Click on the candidate you wish to interview with the word review next to their name. You will be taken to their application page.



5. From this page, click on Move Forward and then click Interview.
6. You can click on the Schedule link that appears in the Up Next box at the top of the page to move on. Or, you can click the Schedule button on the candidate’s application page.






You have submitted: Review Candidate ✕

Up next: [Schedule](#) by Robert De Niro [View Details](#)

Active Job Applications (1)

 [Freddy Krueger - R401 Retail Sales Associate \(C116\)](#) [Schedule](#)

Location: 110075 - 7th St Store | Date Applied: 10/01/2020
Interview

[Actions](#) ▾

[Decline These Applications](#)

7. You may be re-directed to sign in to your Goodwill Outlook account. Follow the directions to log in. If you are already logged in, go to the next step.
8. Select a date for the interview.
9. The interviewers will default, but you can change/add additional interviewers if you would like.
10. Enter the interview time amount in Duration (minutes).
11. Enter Interview Type (In Person, Phone, etc.).
12. Add the appropriate Interview Guide in the Questionnaire section.

Date *
10/05/2020

Time Zone *
× GMT-07:00 Mountain Standard Time (Phoenix)

1 Item

Order	*Interviewers	*Duration (In minutes)	Interview Type	Questionnaires
+	× Robert De Niro	30	× In Person	× Retail Sales Associate 1st Interview

Note: Anyone listed in the Interviewers section will receive the Give Interview Feedback task in their inbox, requesting them to answer the interview questions.

13. Click Next.
14. Click Schedule.
15. An Interview box will pop up. Select the name(s) of the interviewer(s), a start time, and then click OK.
16. Click Next and review the interview information on the next page.
17. Click Submit.

Freddy Krueger (C116)

R401 Retail Sales Associate (Open)

Schedule Interview

Time Zone
GMT-07:00 Mountain Standard Time (Phoenix)

Interviewers *
× Robert De Niro

Start Time *
10/05/2020 08:00 AM

Duration (in minutes) *
30

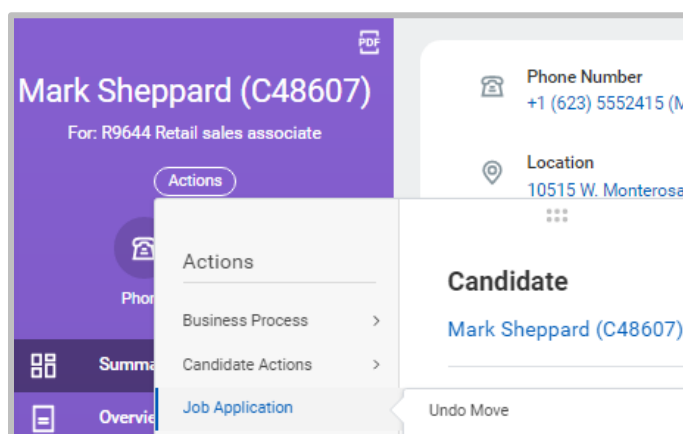
Available Rooms
[Empty dropdown menu]

OK
Cancel

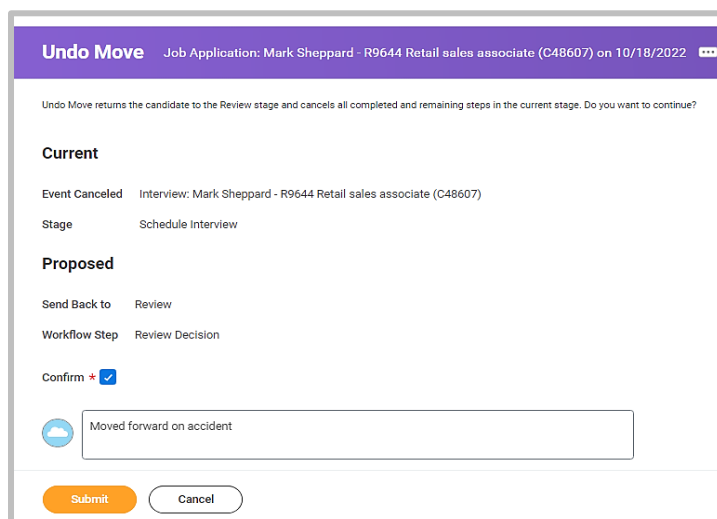
Moved Forward by Accident (Undo Move)

If you've accidentally moved a candidate into a recruiting stage, you can use the Undo Move from a candidate's profile and move them back to the previous stage. This will work with every stage except if an Offer has already been sent to a candidate. If that happens, please reach out to Recruiting for assistance.

1. Navigate to the candidate's profile.
2. From the candidate's related actions, click on Job Application, then Undo Move.




3. Click OK.
4. Confirm by clicking on the check box and add a comment.
5. Click Submit. The candidate will now be back into the stage they were before they were moved forward.



Reschedule Interview

(Positions Managed by a Manager)


1. Click on the  Inbox icon.
2. Click on the task with the candidate's name and the requisition name/number listed. Once opened, you will see the title "Manage Interview Feedback" on the right.
3. Click on the "Reschedule Interview" button and follow the Steps to reschedule the interview.



Note: These Steps are the same as the Schedule Interview above.


Giving Interview Feedback

(Positions Managed by a Manager)

1. Click on the  Inbox icon.
2. Click on the task with the candidate's name and the requisition name/number listed. Once opened, you will see the title "Give Interview Feedback" on the right.



Note: You can also access Interview Feedback by navigating back to the requisition > click on Candidates > select the candidate > open task from their application page.

Freddy Krueger - R401 Retail Sales Associate (C116)
by Robert De Niro 
1 day(s) ago

Give Interview Feedback

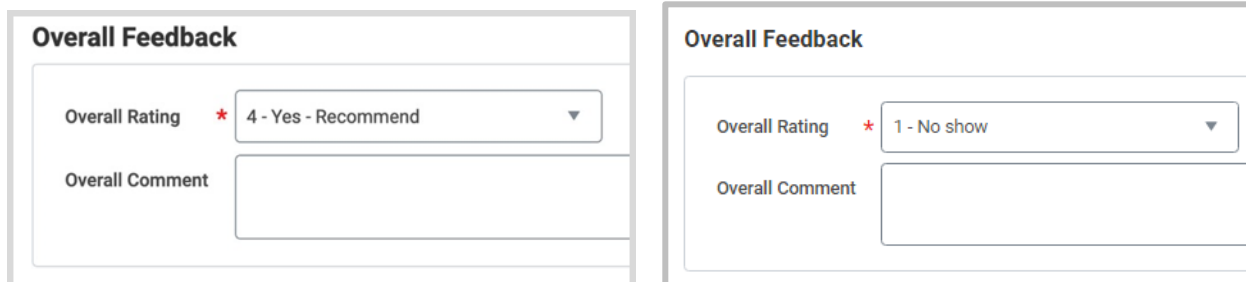
1 day(s) ago

[Freddy Krueger](#)

For: [R401 Retail Sales Associate](#)

3. Fill in the questions with answers the candidate provides.

4. For Overall Feedback, select a rating from the dropdown.



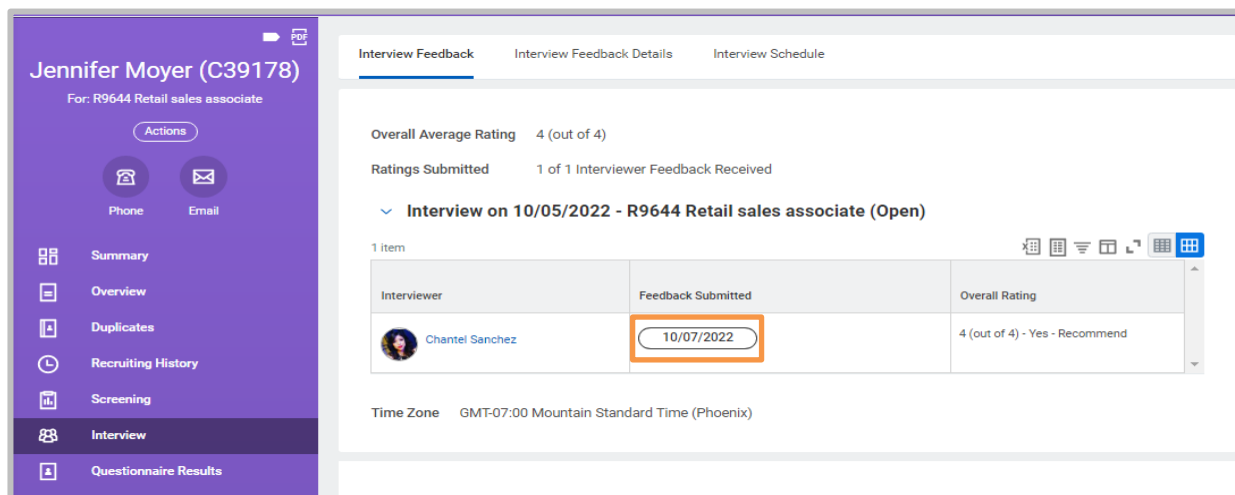
5. Click Submit.

6. Click Done.


7. The “Manage Interview Feedback” task will appear in your inbox immediately after. Open the task, review the details, and click Submit and Done.

Note: If the candidate is a No Show to the Interview. Set the Overall Rating to “No–Show” and submit the task. This will allow you to decline the candidate.

Note: To view past interview responses, navigate to the Interview section of the Candidates Profile and click on the button with the date under Feedback Submitted. A popup will display the responses the manager added to the interview guide. Click Done to exit the popup.





Generate an Offer

1. Click on the  Inbox icon.
2. Click on the task with the title Interview and the candidate's name. This task will display the candidate's application page to the right.

Interview: Freddy Krueger - R401 Retail Sales Associate (C116)
2 minute(s) ago

Move Forward ▼

3. Click on the Move Forward button and then click Offer.
4. You will automatically be taken to the next task: Initiate Offer.
Fill in the following using the  and  icons to edit and save.
 - a. Hire Date; select the date of hire.
 - b. Hire Reason; choose the most relevant reason. If they are a re-hire, be sure to select Re-Hire.
 - c. Location; be sure this is the correct location.
 - d. Job Details; review.
 - e. Worked Hours; review and correct if necessary.

Details

Target Hire Date (Job Requisition)
10/01/2020

Hire Date *
10/12/2020

Hire Reason *
Hire Employee > New Hire

Location *
110075 - 7th St Store

Document Language
English (United States)


5. Click Next.
6. Review compensation details and then click Next.
7. Skip One-Time Payments and click Next.
8. Click Submit.


Success! Event submitted

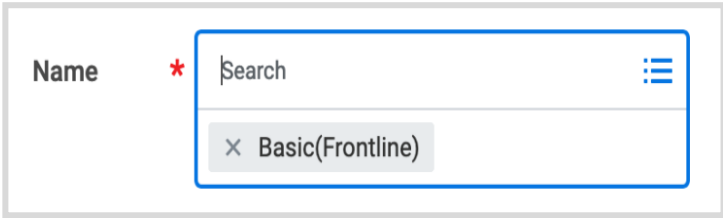
Up Next: Initiator | Generate Document for Offer (Default Definition): GCNA Offer Letter - GCNA Offer Letter

[View Details](#)

Order a Background Check


1. Click on the  Inbox icon.
2. Click on the task with the title “Offer for Job Application” and the candidate’s name. You will see the candidates profile display to the right.
3. Click Move Forward and then click Background Check.
4. On the next page, click inside the Name box and select the most appropriate background check.

 **Note:** For all non-management retail positions, you’ll select the Basic background check package.



A screenshot of a web form showing a dropdown menu for a field labeled "Name". The field has a red asterisk indicating it is required. The dropdown menu is open, showing a search bar with the text "Search" and a list of options. The first option is "Basic(Frontline)" with a small 'x' icon to its left. There is a hamburger menu icon to the right of the search bar.


5. Click Submit.
6. Click the Refresh button, to refresh your Inbox.
7. Once you receive the results email from Recruiting Operations, you will navigate back to your inbox for the “Select Background Check Overall Status” task and select either Passed or Did Not Pass.


 **Note:** We will no longer be logging into EagleScreen. Results will update in your inbox, and we will use the same Flagged Background Check process.

- a. Pending Candidate: Candidate received instructions to complete background check.
- b. Pending: Candidate submitted their background check and we’re waiting on EagleScreen to process the results.


- c. Requires Review: Candidate’s background was flagged, and you need to wait until Recruiting Operations adjudicates the report and sends you a Favorable or Unfavorable email.
- d. Passed: Background check completed with no flags on the report. You can click Submit, and move forward in the process.


Background Check


Status Date * 10/05/2020 

Status * 

8. Click Submit.

 **Note:** If this position requires a drug screen, follow the Order Drug Screen Steps. If not, proceed to the onboarding process.

 **Note:** New hires are required to have a completed background check before they are hired. If you try to move a candidate into Ready for Hire, without a completed background check, you will get an error that will prevent you from moving forward.

 **Errors and Alerts Found** ▲

Error -

- This candidate does not have a completed background check and cannot move forward until that happens.
(Background Check Event)

 **Note:** Please reach out to Recruiting Operations for any questions about backgrounds.

- If the candidate does not pass the background check, from the “Select Background Check Overall Status” task change the status to Did Not Pass and click Submit.

Background Check

Status Date * 10/07/2022

Status * X Did Not Pass

Comment

▼ **Details**

Background Check Package Details 2 items

Background Check Package Details		Background Check Package Tests		
Status	Results URL	Test Name	Test Status	Status Date
Requires Review	https://eaglescreen.screening.services/mvp/login_form.cfm?viewreport1173813Andusertypeclient	Multi Jurisdiction Criminal/Sex Offender		
		SSN Check		

- Refresh your inbox, and from the background check task, decline the candidate with “Rescinded – Not acceptable background check”.

Screening

Interview

Questionnaire Re

Rescinded - Failed to pass drug/alcohol screening test

Rescinded - Not acceptable background check

Rescinded - Not acceptable MVR

Candidate Withdrawn

Hired for Another Job

Move Forward ▼

Decline ▼

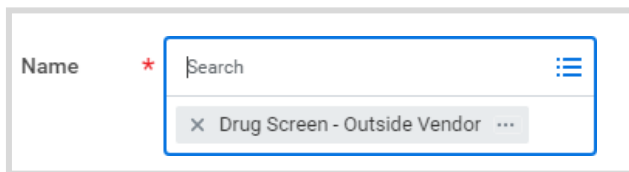
More ▼

Order Drug Screen (Only for Required Positions)

1. Click on the Inbox icon.
2. Click on the task with the title “Background Check for Job Application” and the candidate’s name. You will see the candidates profile display to the right.
3. Click Move Forward and then click Additional Screen.

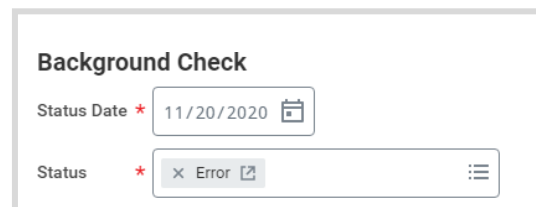


4. You will receive another inbox task titled, “Additional Screen” with the candidate’s name. Once opened, click inside the Name box and select Drug Screen – Outside Vendor.



5. Click Submit.
6. You will need to manually enter the results after you receive them from HR. Once you have, navigate back to your inbox and click on the task with the title “Background Check for Job Application” and the candidate’s name.

7. Fill out the status date.
8. Select the status result you received from HR.



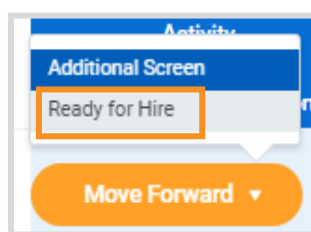
Note: You may get an error message – just ignore this.

9. Click Submit.

Note: Reach out to Recruiting Operations for any questions about drug screen testing.

Hire New Team Member

1. Click on the Inbox icon, or refresh your page if you are already there. Click on the task titled “Background Check for Job Application” and the candidate’s name. Their profile displays to the right.
2. Review the details and then click Move Forward > Ready for Hire.





3. The New Hire Form will appear in your inbox labeled as Revise Employee Hire task. Review the Start Date and make any changes needed.

Note: New Hires cannot start work on the same day they are hired. If the hiring process is completed before 9:00 pm, the account integrations will complete successfully, and the account will be ready the following day.



4. Click Submit and then Done.
5. Another task will appear in your inbox for you to approve the New Hire Form and any changes made. Click Approve and then Done.

 **Note:** Before approving make sure the Hire Date is correct, hire date is the first day of the team member’s 1st day in the position.

 **Note:** For all Rehires, additional approvals must be completed before the terminated worker will show up as active in Workday. Looking at the “Up Next” section after submitting the revised employee hire step, you can see if there are additional steps. Once the step is completed, the Onboarding Setup for Hire step will display.

Success! Event approved


Up Next: HR Partner | Complete Form I-9 Section 3: Connie Gustafson - Complete Form I-9 Section 3

[View Details](#)

6. Refresh your Inbox so the “Onboarding Setup for Hire task displays.
7. Click Submit and then Done.



The screenshot shows the 'Onboarding Setup' task in the Workday interface. The task title is 'Onboarding Setup for Hire: Magic Johnson - Retail Sales Associate on 10/30/2020'. Below the title, there is a 'Message' section with the text: 'Welcome to the Goodwill family! We're excited to have you join us. You will play a vital role in helping us with our mission to Empower Individuals, Strengthen Families, and Build Stronger Communities. Please meet your new teammates below.'


 **Note:** Re-Hire onboarding tasks will not display until HR Services completes the final rehire task of reviewing the worker’s service dates.

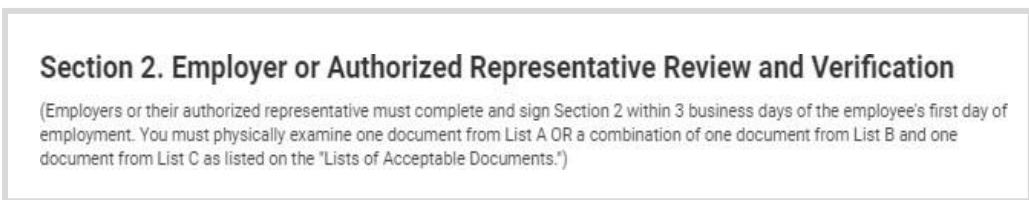
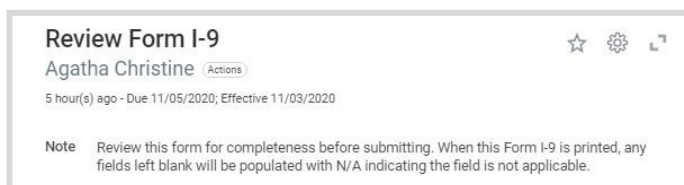
Success! Event submitted

Up Next: HR Partner | Hire: Connie Gustafson - Edit Service Dates

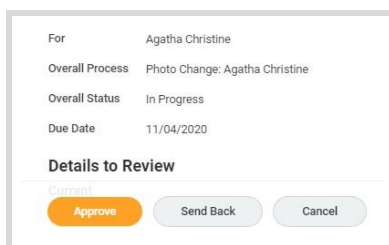
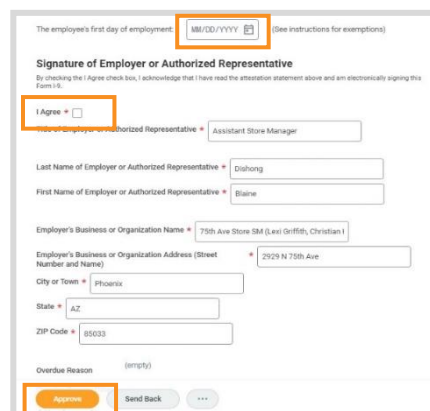
[View Details](#)

Onboarding Approvals

1. Click on the  Inbox icon.
2. Once the new hire has completed the following tasks, the hiring manager will need to approve them from their inbox:
3. Review Form I-9.
 - a. Locate the task title Review Form I-9 and review all details. Managers will need to read Section 2 of Employer or Authorized Representative Review and Verification and fill out the required fields regarding documentation.




- b. Select the new hire's first day of work.
 - c. Check the "I agree" box.
 - d. Click Approve.
4. Photo Change.
 - a. Review the submitted picture to make sure it is works.
 - b. Click Approve.





Create a Job Requisition

The following steps will be used for hiring these job positions only:

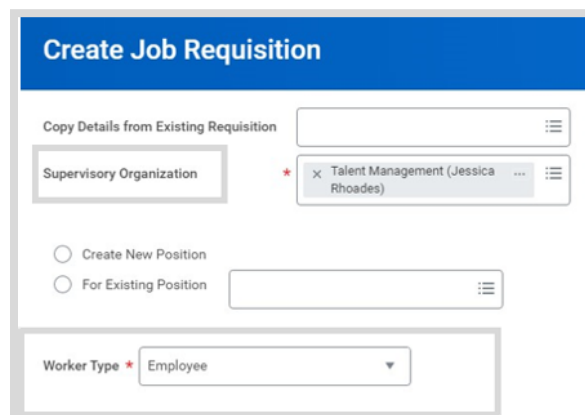
- All Mission positions
- District Managers
- Retail Operations Managers
- All Corporate positions
- Regional Directors

 **Note:** If you are creating a Job Requisition for a position **not** currently recognized in our system you will need to refer to the “Create a New Job Profile” steps. Once the request is approved, you may create the requisition.

1. Click on the  Recruiting application. If you do not have the recruiting application on your homepage, you can type ‘create job requisition’ into the search bar. Skip to step 3.
2. Under Actions, click Create Job Requisition

 **Note:** If the job requisition already exists, you can click into the Copy Details from Existing Requisition box and select the one that best fits.

3. Make sure that the Supervisory Organization reflects the manager that the new team member will report to. If it does not, search and change this field.



Create Job Requisition

Copy Details from Existing Requisition

Supervisory Organization * Talent Management (Jessica Rhoades)

Create New Position

For Existing Position

Worker Type * Employee



4. Select an option:

- a. **Create New Position:** Select this option if you need additional headcount for this position.
- b. **For Existing Position:** This option is for an existing position that you are backfilling. Click into the box to search for the position, or type into the box and hit enter to search.



Note: If you select a position attached to a current worker, you will be unable to fill that position until the current worker vacates it. It's always good practice to check into the "For Existing Position" section and fill any "Unfilled" positions before you request to create a new position.

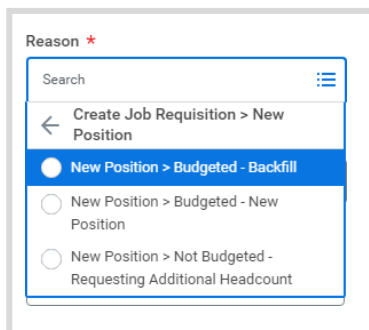
5. Leave Worker Type as Employee and Click OK.

6. From the Recruiting Details page, complete the following by using the  and  icons to edit and save:

a. Number of openings.

b. Reason:

- If you chose Existing Position, select New Position > Budgeted – Backfill (for filling an empty, existing position)





- If you chose to Create New Position, select either option:

New Position > Budgeted – New Position (the new position that was requested and budgeted for)

New Position > Not budgeted – Requesting Additional Headcount.

- c. Replacement For: Auto populates.
- d. Recruiting Instruction: Optional field.
- e. Recruiting Start Date: Date is defaulted. Do not change.
- f. Target Hire Date: Select a future date.
- g. Target End Date: Leave blank.
- h. Referral Details: Leave blank.

7. Click Next.

8. From the Job Details page, complete the following by using the  and  icons to edit and save:

a. Job Posting Title: This should match the Job Profile you select in the next step.

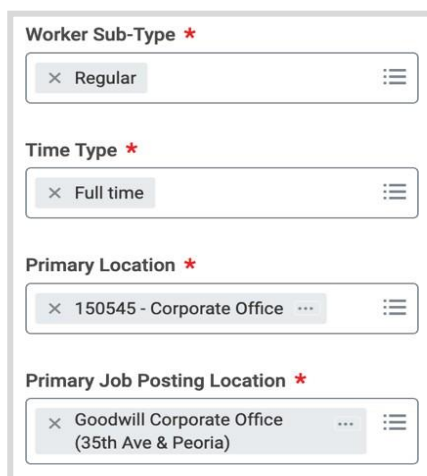


A screenshot of a form field labeled "Job Posting Title *". The field contains the text "HR Business Partner".

b. Job Profile: Click into the box and search for the position you want to hire for. Make sure this matches your Posting Title.

c. Job Description: This will auto-populate based on your selected job profile. Do not change.

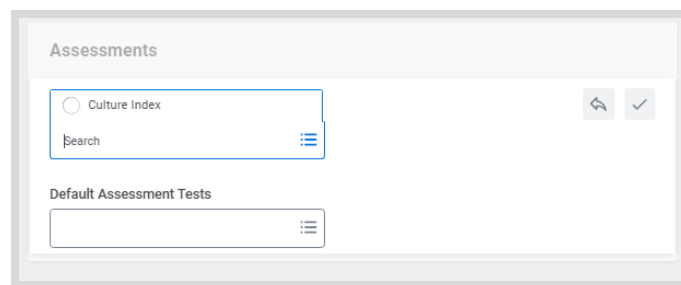
d. Worker Sub-Type: Select Worker Type>Regular.



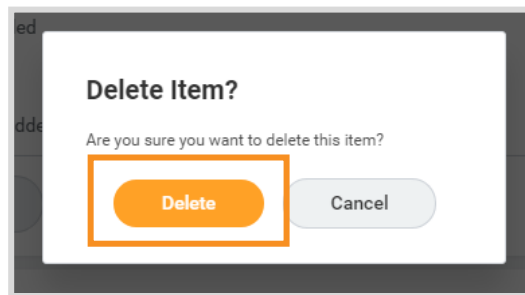
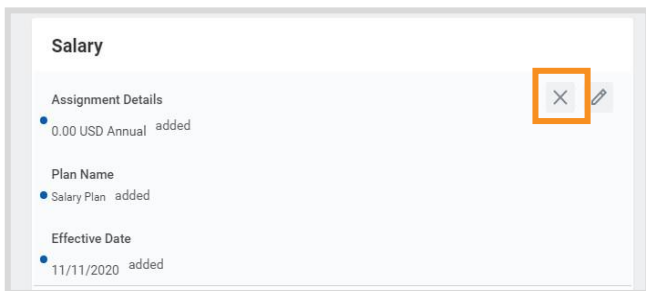
A screenshot of four form fields, each with a dropdown menu and a menu icon:

- Worker Sub-Type ***: Selected "Regular".
- Time Type ***: Selected "Full time".
- Primary Location ***: Selected "150545 - Corporate Office ...".
- Primary Job Posting Location ***: Selected "Goodwill Corporate Office (35th Ave & Peoria)".

- e. Time Type: Select either Full Time or Part Time.
- f. Primary Location: Select your location.
- g. Primary Job Location: This will default. Do not change.
- h. Scheduled Weekly Hours: If Full Time, hours will default. If Part-time, you will need to enter 20 hours.
- i. Assessment: Select Culture Index.



- 9. Click Next.
- 10. From the Organization page, verify all sections. No action is required if all information is correct.
- 11. Click Next.
- 12. Skip Attachments and click Next.
- 13. From the Compensation page, follow these Steps:
 - a. Total Base Pay and Guidelines will auto-populate.
 - b. The pay rate is determined once an offer is extended. Therefore, you will need to remove it from the public requisition.
 - c. Click the X button to delete either the Salary or Hourly section completed.
 - d. Click Delete when prompted.



e. Allowance and Merit will auto-populate for you.

14. Click Next.

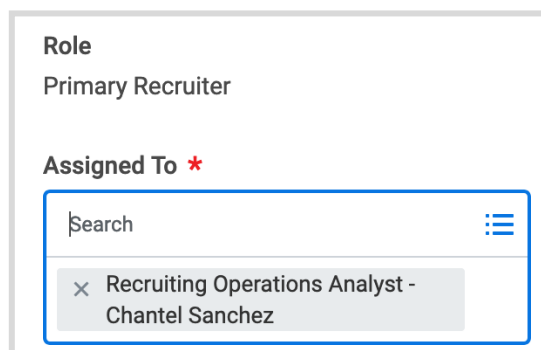
15. Assign Roles

a. Click Add.

b. Role > Primary Recruiter.

c. Assigned To: Type/search for your team's designated recruiter from the Goodwill Recruiting Team.

d. Skip Secondary Recruiter.



Note: Only the Primary Recruiter(s) can work inside the requisition. If you are creating a requisition on behalf of the hiring manager and want access to the information, you must put yourself down as a recruiter.


16. Click Next.

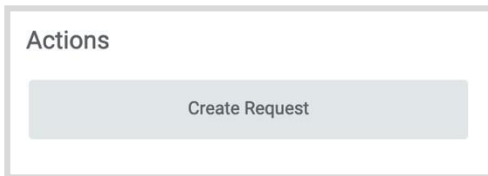
17. Review all details and then click Submit.

Note: Once your recruiter has generated some candidates for you to interview, follow the Give Interview Feedback (positions managed by a recruiter) Steps.

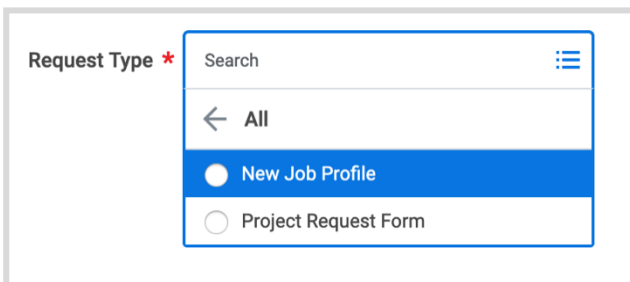


Create a New Job Profile

1. Click on  the Requests application.
2. Under Actions, click on Create Request.



3. Click inside the Request Type box > All > New Job Profile.




4. Click OK.
5. Describe the request in the first text box, you will provide more details in the questionnaire.
6. Answer all questions in the questionnaire below.
7. Click Submit.
8. The Up Next page appears. Click Done.

Giving Interview Feedback (Positions Managed by a Recruiter)

This version of giving interview feedback will be used after you have interviewed the candidates your recruiter has set up for you. Before following these Steps, scan the filled-out questionnaire you used during the interview and save it to your computer. If you have multiple candidates, do not scan all questionnaires together – you must scan them in separate files.

Please note that this process is for hiring positions that are listed using the [Create a Job Requisition \(Positions Managed by a Recruiter\)](#) Steps.

1. Click on the  Inbox icon.
2. Click on the task with the candidate's name and the requisition name/number listed. Once opened, you will see the title "Give Interview Feedback" on the right.
3. Click on the Select Files option and add your scanned interview questionnaire.
4. For Overall Feedback, select a rating from the dropdown.
5. Click Submit.
6. Click Done.

