



Workday Training for All Managers

Training Class 2

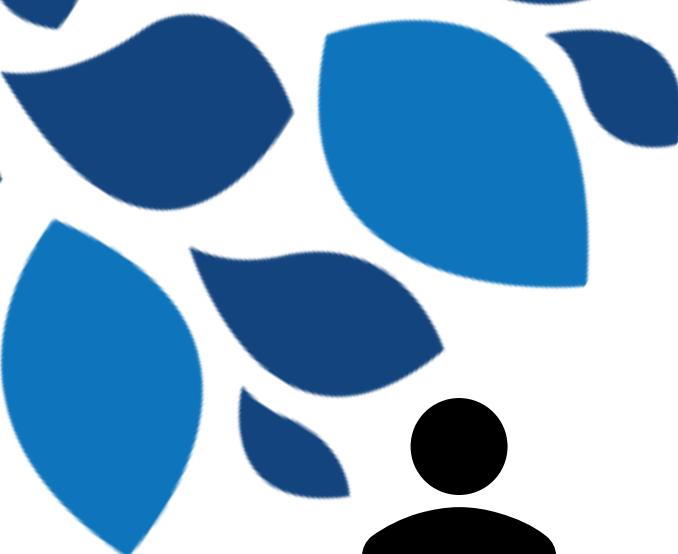
July 2025



Goal

Introduce all Managers to a deeper level
of understanding of core business
processes and concepts in Workday.





Training Options

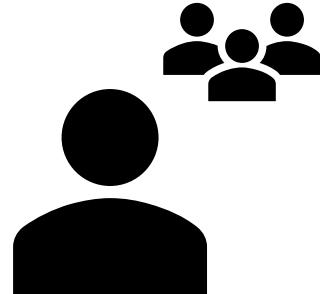


Employee

Employee Training #1
June 10, 11, OR 12
(ONLY 1 to ATTEND)



Hourly Employee



Manager

Employee Training #2
July 8, OR 9
(ATTEND ONLY 1)

Hourly Employee Training
TBD
(ONLY 1 to ATTEND)

Manager Training #1
June 17 OR 18
(ONLY 1 to ATTEND)

Manager Training #2
July 1 OR 2
(ATTEND ONLY 1)

Agenda

INTRODUCTION

FINANCE & EXPENSES

PAYROLL – PTO & TIME TRACKING

HR - RECRUITING & ONBOARDING

HR – PEOPLE MOVES, TERMINATION

HR - TALENT

WHAT'S NEXT?

90 Minutes



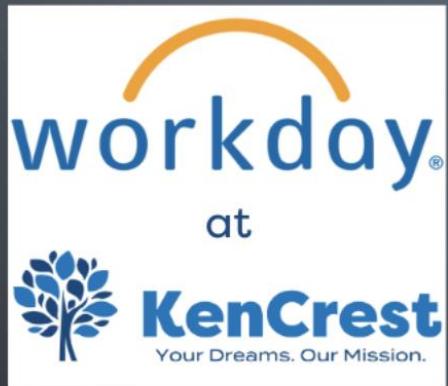
LEARNING RESOURCES



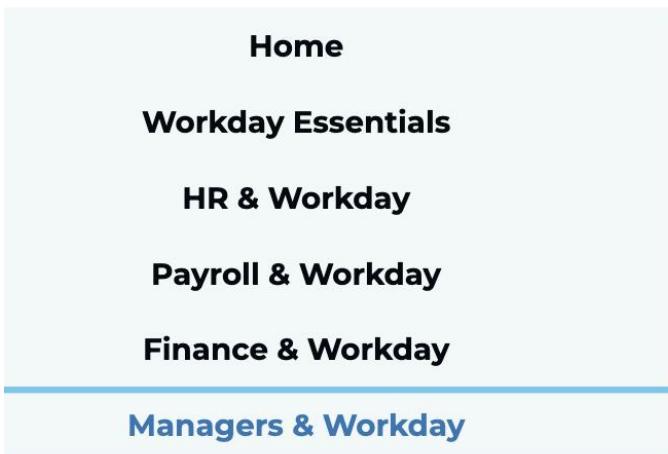
Manager Job Aids



Definition: Simple, clear instructions in how to do a work task.



www.kencrest.org/workday



This page is under development

- Manage Employee Job Changes/Termination
- Manage Business Processes
- Using My Tasks
- Finance: Approve Expense Reports
- Payroll: Assign Work Schedule
- Payroll: Manage Team Compensation
- Payroll: Request One-Time Payment
- Recruiting: Hire an Employee
- Talent: Complete a Performance Review
- Talent: Create a Performance Review
- Talent: Manage Team Goals

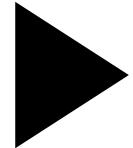


Communication Channels

- Weekly Communications Email
- Town Hall
- Employee Portal
- Relias
- Dayforce Landing Page (and email)
- EAC Meetings (and email)
- Govenda (for board members)
- Change Champions
- All pointing towards www.kencrest.org/workday



The Manager Role is Important!



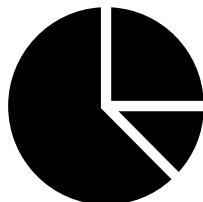
Initiate Business Processes



Review / Approve Steps



Confirm Data Accuracy (e.g. Worker Profile, Org Charts)



Run Reports



Check In >3x per Week



Set-up Notifications



Take Timely Action



Seek Information
Ask for Help

Data Accuracy is KEY!

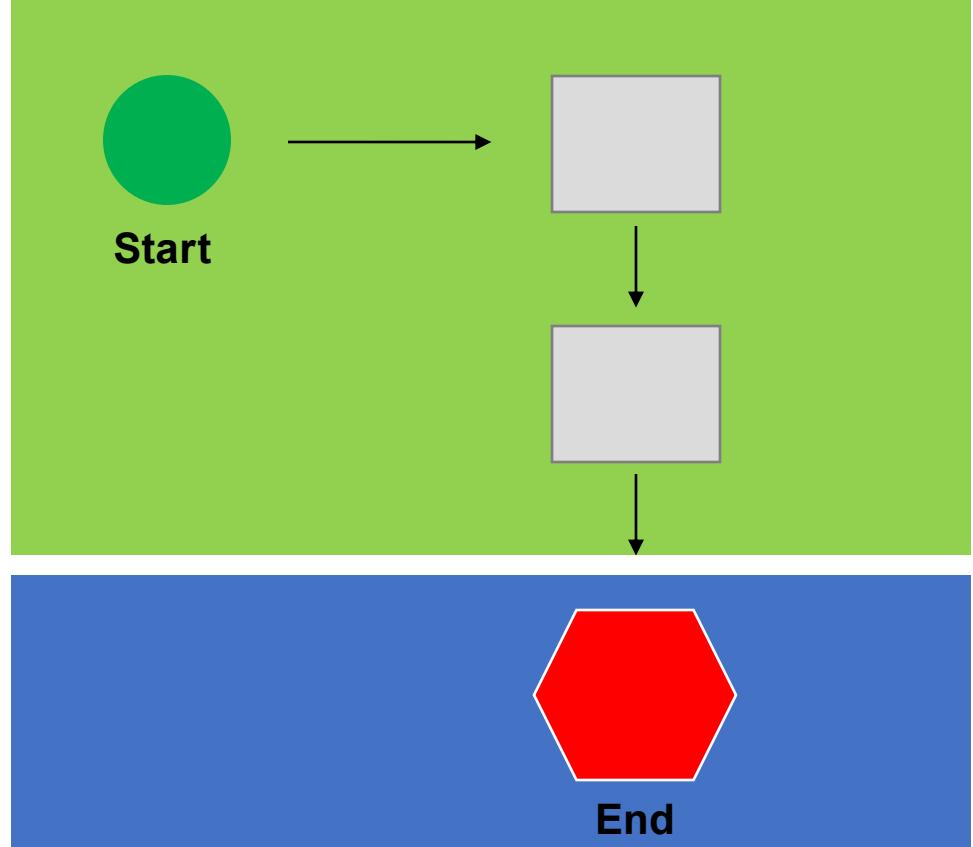
Options for Manager

1. Initiate the BP when you have ALL the info
2. Save for Later
3. Review Step
4. Cancel

5. Correct
6. Rescind

Actions by System Administrator

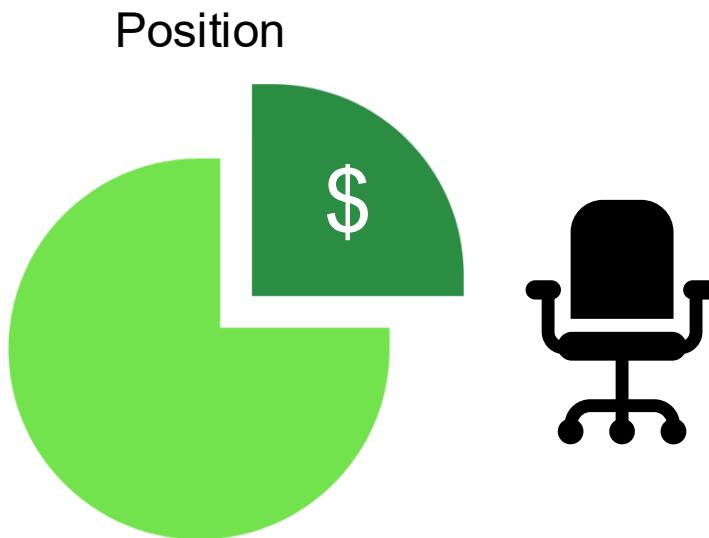
Business Process



WORKDAY COMPONENTS



Positions



Position ID
Position Title
Position Status

Job Profile
Job Family / Job Family Group
Worker Type (Employee, Contingent Worker)
Time Type (Full Time, Part Time)
Scheduled Weekly Hours

Supervisory Organization
Location
Company / Cost Center / Region / Custom Orgs

Positions Principles

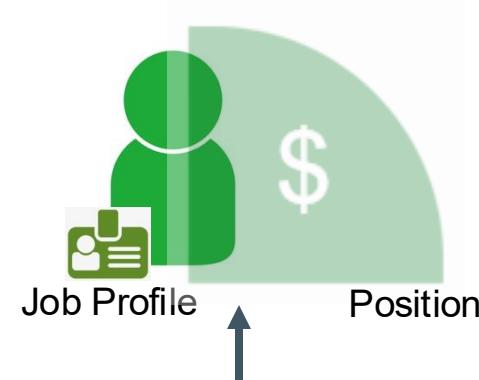
- ✓ Every Worker must have ONE Position
- ✓ A Worker inherits values from the Position (including Job Level, Compensation Grade, and Location)
- ✓ A Worker exists in a “team” because of their Position
- ✓ Managers must manage their Positions (Open, Edit, Close) and prepare them before doing People moves

Position vs. Worker

Position



Worker



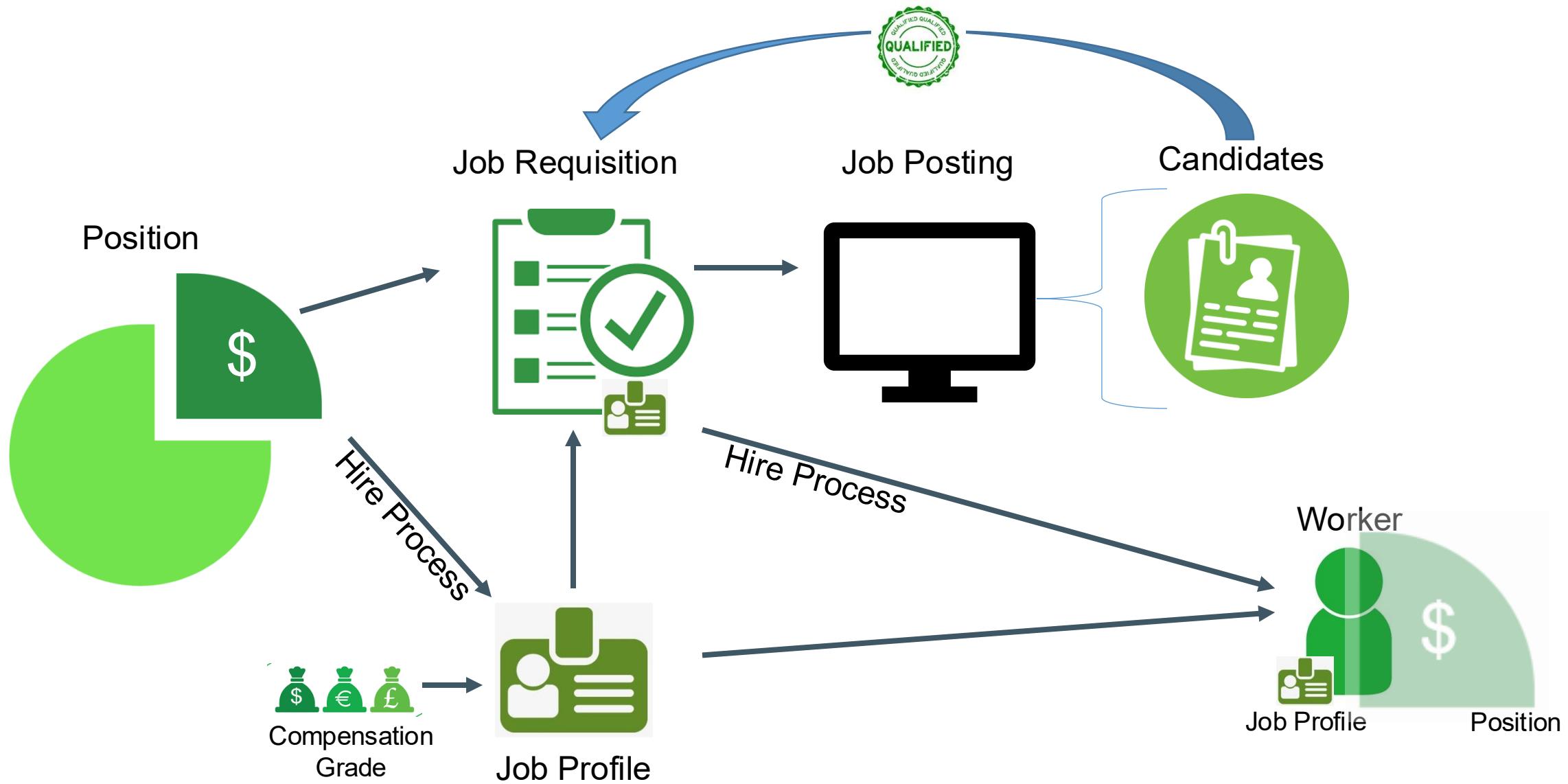
Position

Job Profile

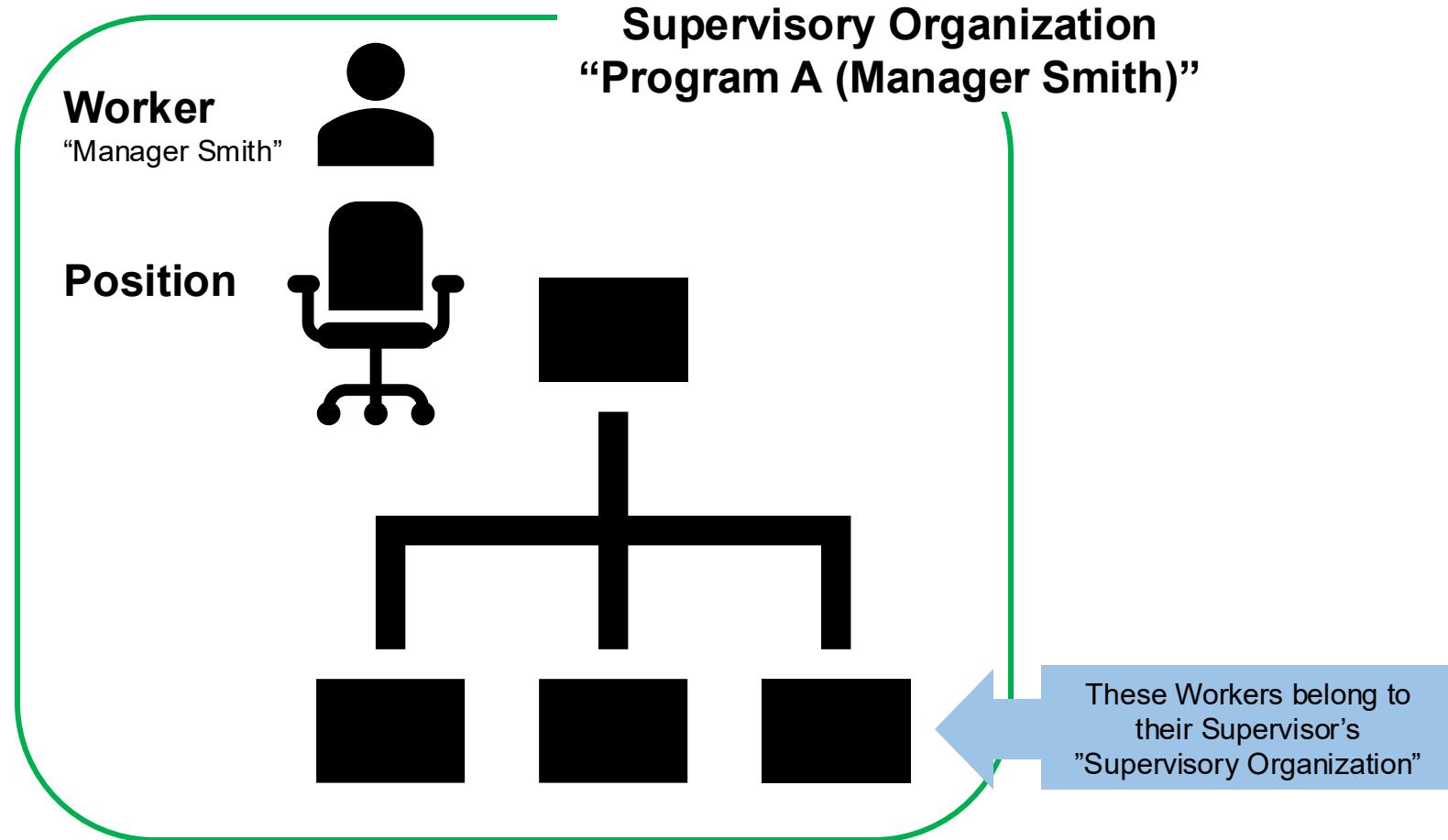


Compensation
Grade

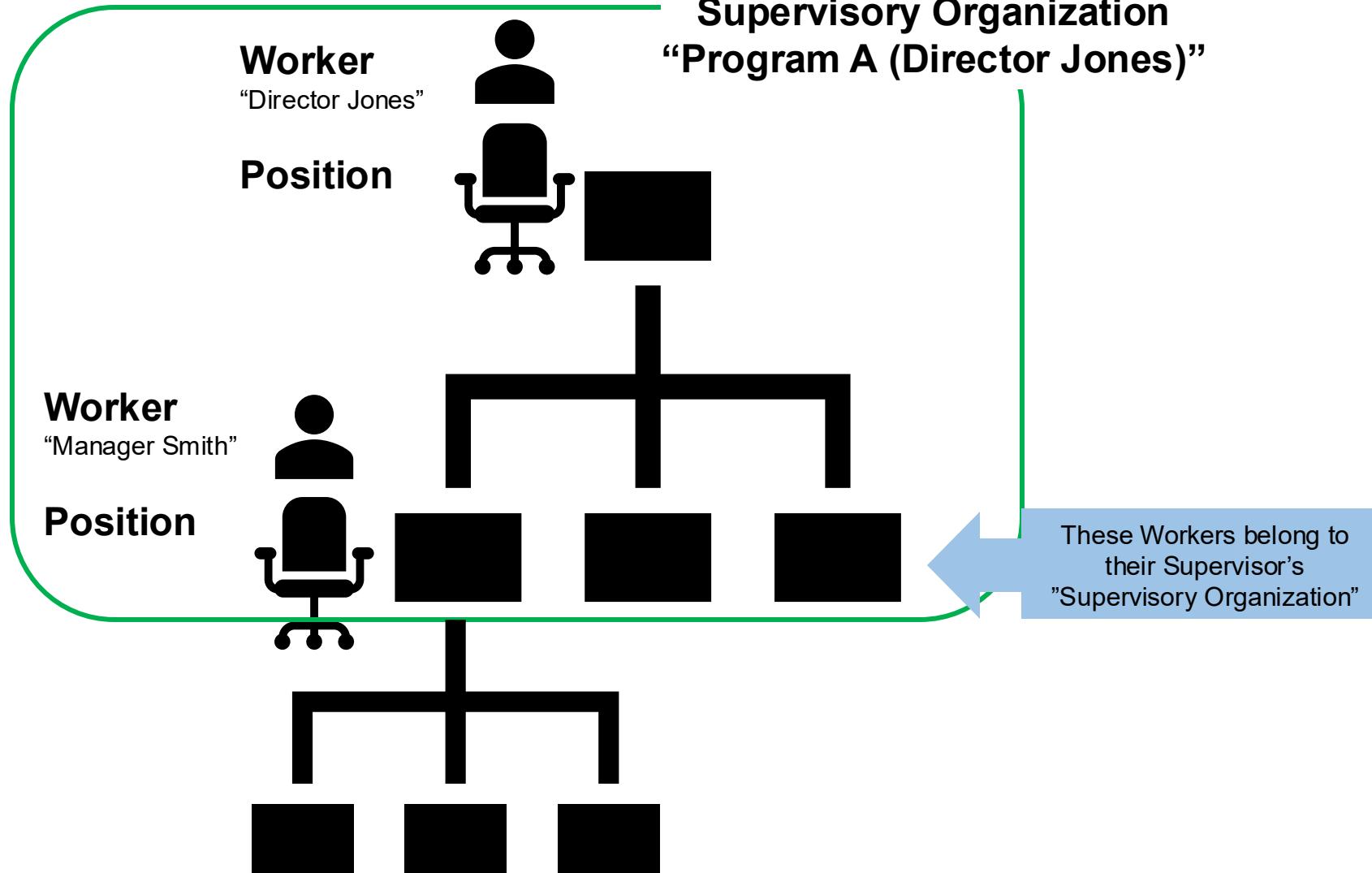
Positions vs. Other Objects



Supervisory Organizations



Supervisory Organizations



Security

Assigned to the POSITION



Business Process Security

Who can initiate,
approve, or view a step
in a Business Process

Domain (Field Level) Security

Controls access to
specific data fields in
Workday (View or
Modify)

Organization (Programs) Security

Security is assigned at
“nodes” of the
organization, and
permissions are
inherited down (or not).

QUESTIONS?

Please type your questions in the chat.

We will do our best to answer them here in the call and/or will add them to the FAQs if we are limited on time.



FINANCE & EXPENSES



Manager Training Topics



APP APPROVAL
NAVIGATION



NOTIFICATIONS



IMPORTANT
DATES



Report Approval-App

The image displays the Workday mobile application interface on a smartphone screen. The top status bar shows the time as 1:15 and battery level at 66%. The main screen features a 'Hello There' greeting and a 'Most Used Apps' section with icons for Time Tracking, Benefits and Pay, and Org Chart. Below this is a 'Recommended for You' section with links to 'Showcase Your Best Self with Your Profile' and 'Understand People Network'. The bottom navigation bar includes icons for Home, Apps, My Tasks (which is selected and highlighted with a red dot), Find, and Profile. The central part of the screen is titled 'My Tasks' and lists several tasks:

- Expense Report for Dorothy Gieniec (31742)** (TODAY, Due 7/2/25)
- Supplier Invoice for TACONY CROSSING** (3D AGO, OVERDUE, Due 6/29/25)
- Performance Review: RYAN CONNELL (31503)** (25D AGO, OVERDUE, Due 6/12/25)
- Integration: GL Conversion Journals - 06/03/2025, 7:37:48.022 AM** (27D AGO)

On the right side of the screen, a detailed view of the first task is shown:

Expense Report for Dorothy Gieniec (31742)
Review Expense Report

Expense Report for Dorothy Gieniec (31742)

Due Date: 07/02/2025

Expense Report Number: 10000147

Company: KCS KenCrest Services

Reimbursement: 0.00

Personal: 0.00

Company Paid: 1,071.33

Total Amount: 1,071.33

Three specific expense items are listed under the 'Gas' category:

- Gas: \$583.25
- Gas: \$77.00
- Gas: (partial view)

Blue arrows point from the task list on the left to the detailed view on the right, indicating the flow of data from the general task list to the specific expense details.

Report Approval-App

1:16

66

Expense Item

Gas

Is Itemized

No

Quantity

1

Amount

\$583.25

Extended

\$583.25

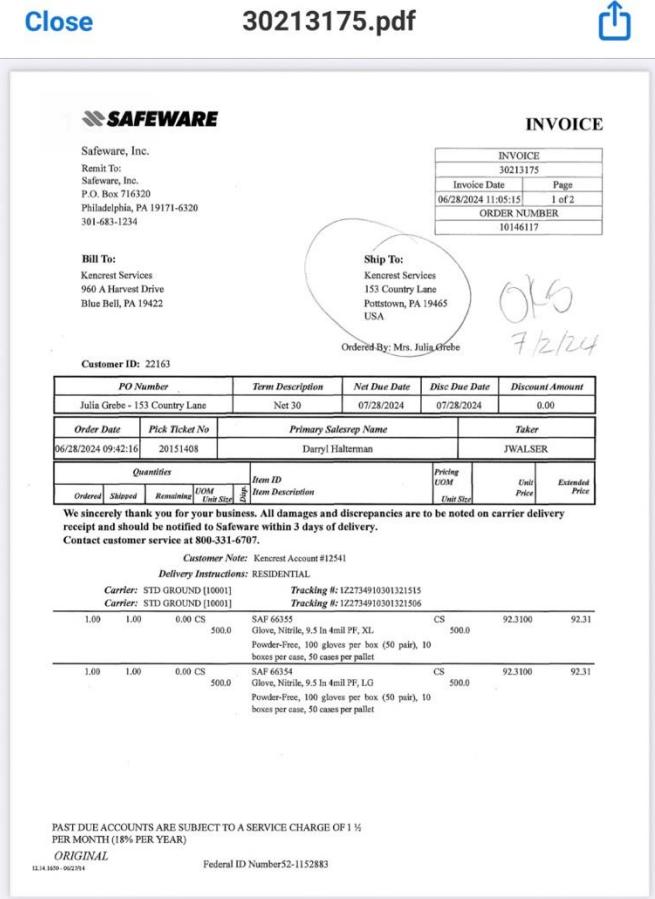
Memo

gas

Attachments



30213175.pdf



Spend Authorization

Gas	\$583.25
Gas	\$77.00
Gas	\$411.08



Comment

More...

Approve

Company

KCS KenCrest Services

Cost Center

54910 144 Belmont Ave, Ambler, PA 19002

Outstanding Notification Email

- You and the cardholder will receive an email from Workday after the transactions have been outstanding 30 days.
- If left incomplete you will continue to receive the same email every 10 days after the initial 30-day email.
- At the 60-day outstanding mark, you will receive a critical email stating that the expenses are severely past due.
- After 90 days the last email will be sent stating that the card is subject to temporary suspension until completion.

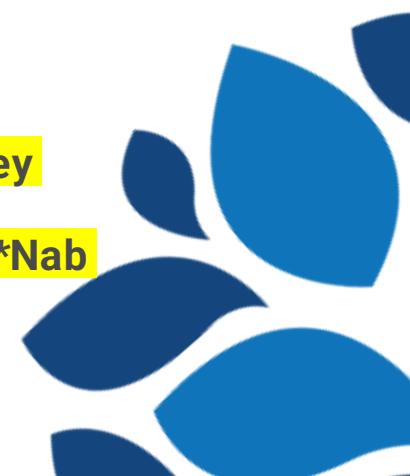
- You have outstanding Corporate credit card transactions

• Please review your Expense Hub and submit it as soon as possible.

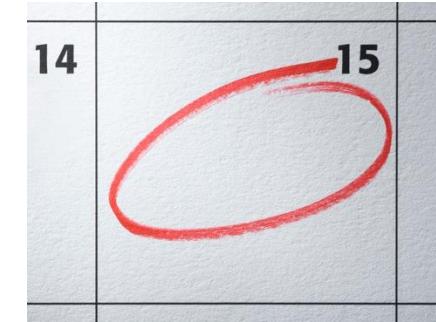
RYAN CONNELL (31503) Please review and submit your reports as soon as possible. **05/23/2025 Pitney**

Bowes Leasing 6.77 USD ←

RYAN CONNELL (31503) Please review and submit your reports as soon as possible. **05/22/2025 APF*Nab 324, LLC 1,647.84 USD**



Dates to Remember



- Any FY25 expenses will be sent into AP like normal. FY26 expenses will need to be completed in Workday.
- 7/1/25- Official start of using Workday for Out-Of-Pocket and credit card expense reports.
 - You will still can work on previous M&T Centresuite expenses
- 7/7/25- **ALL expenses, credit card and travel need to be submitted!!!!**
- 7/11/25- First housing expense report will be available in Workday.
- 7/25/25- First Admin expense report will be available in Workday.

If you have an Admin card you may have noticed a July expense report in M&T Centresuite. **DO NOT** work on or complete.

AP Process FYI

- To add a new vendor, email Dottie Gieniec or Cynthia Hardee
 - Completed W-9 must be included
- The AP process will remain the same:
 - Send all invoices APIvoices (ONLY) in PDF format
 - Please include approval, Spend Category and Cost Center on invoice
 - Any comments should be included on the invoice
 - Note: the mailbox is not monitored



QUESTIONS?

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PAYROLL – PTO & TIME TRACKING





Workday and Payroll



Agenda:

- Manager Team Overview
- PTO Request
- Time Tracking
- Request One Time Payment

Now that we are Live...

- Review your home screen to ensure all your direct reports are listed under the **Team Highlights** widget.

Awaiting Your Action

Time Off Balance Transfer for Data Change: Norma Megan Salomon (32492) - CT - Direct Support Professional on 06/12/2025

My Tasks - 2 hour(s) ago

[DUE 06/29/2025](#)

Time Off Balance Transfer for Data Change: Tatyanna Pierre (22666) - CT - Direct Support Professional on 05/15/2025

My Tasks - 4 hour(s) ago

[DUE 06/29/2025](#)

Time Off Balance Transfer for Data Change: Saundre Jones (32349) - CT - Direct Support Professional on 04/28/2025

My Tasks - 8 hour(s) ago

[DUE 06/29/2025](#)

[Go to My Tasks \(4\)](#)

Team Highlights

 [Gail Davis \(13036\)](#)

 [KATRICE QUICK \(32757\)](#)

 [Stacey Fragale \(21001\)](#)

 [Toni Jefferson \(32313\)](#)

Important Dates

JUL [Holiday](#)
4 Independence Day

[Go to Team Calendar](#)

Quick Tasks

[My Payslips](#)

[Time Off Balance](#)

[My Goals](#)

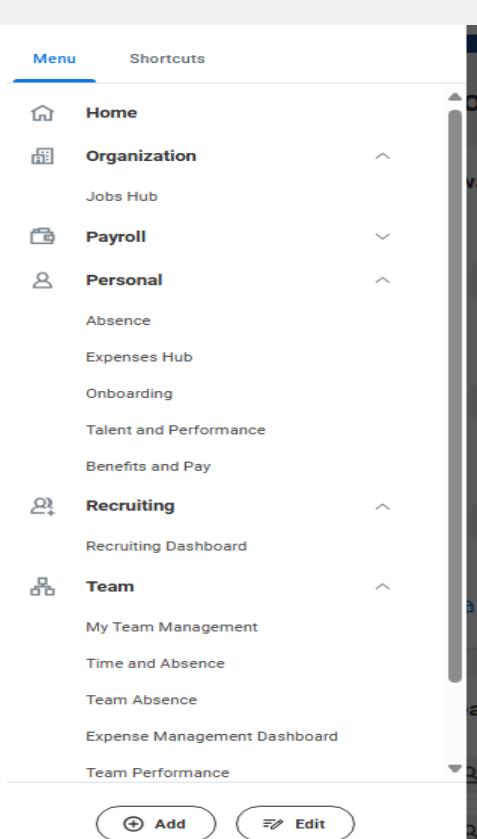
Your Top Apps

 [Jobs Hub](#)

 [Pay Cycle Command Center](#)

 [Absence](#)

 [Expenses Hub](#)



On the left side of the screen access your menu bar

- One of the main things you will access as a manager in Workday is the TEAM hub, this is where you can manage Team absence, Team performance and soon to come Team Time.

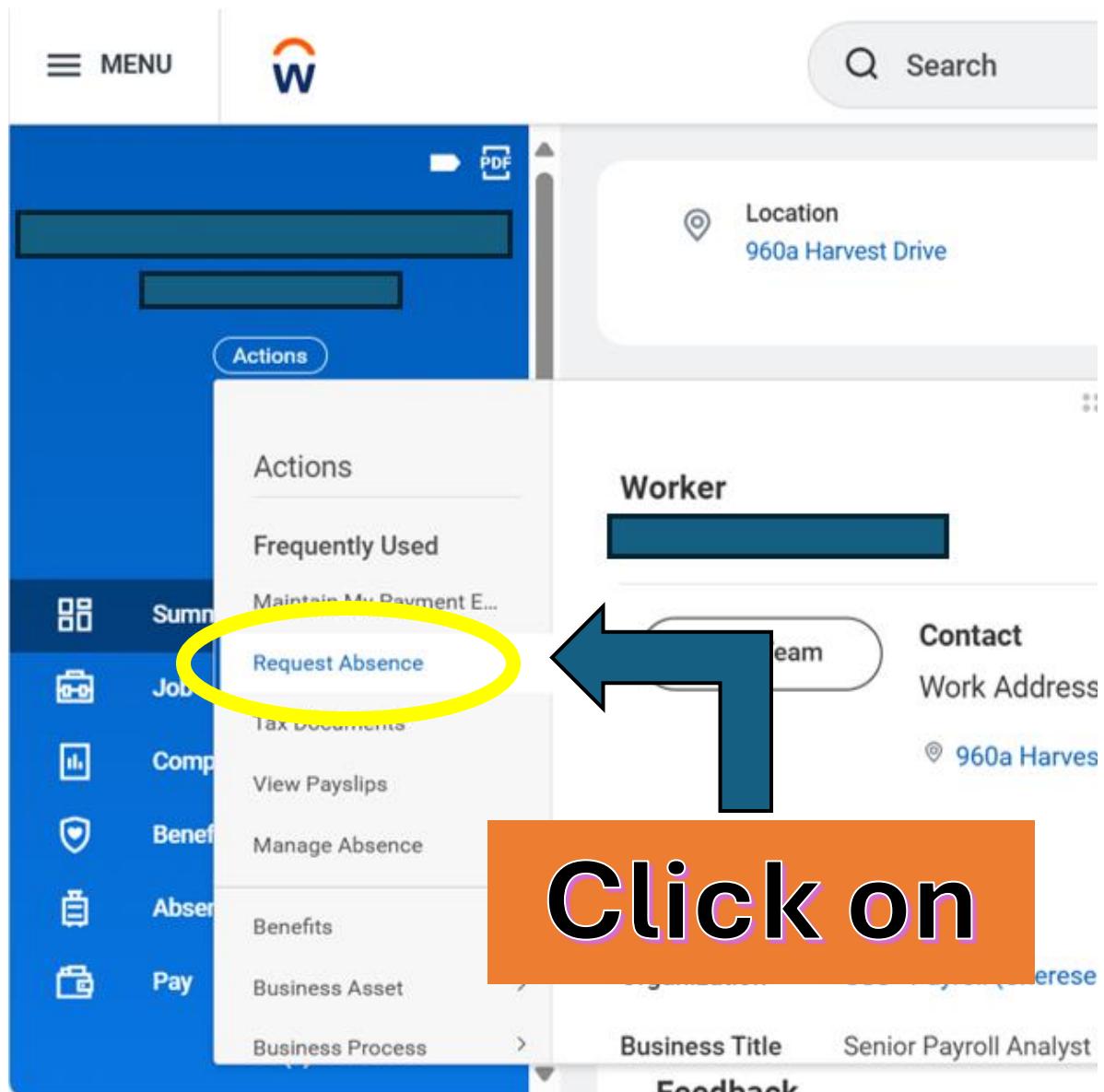
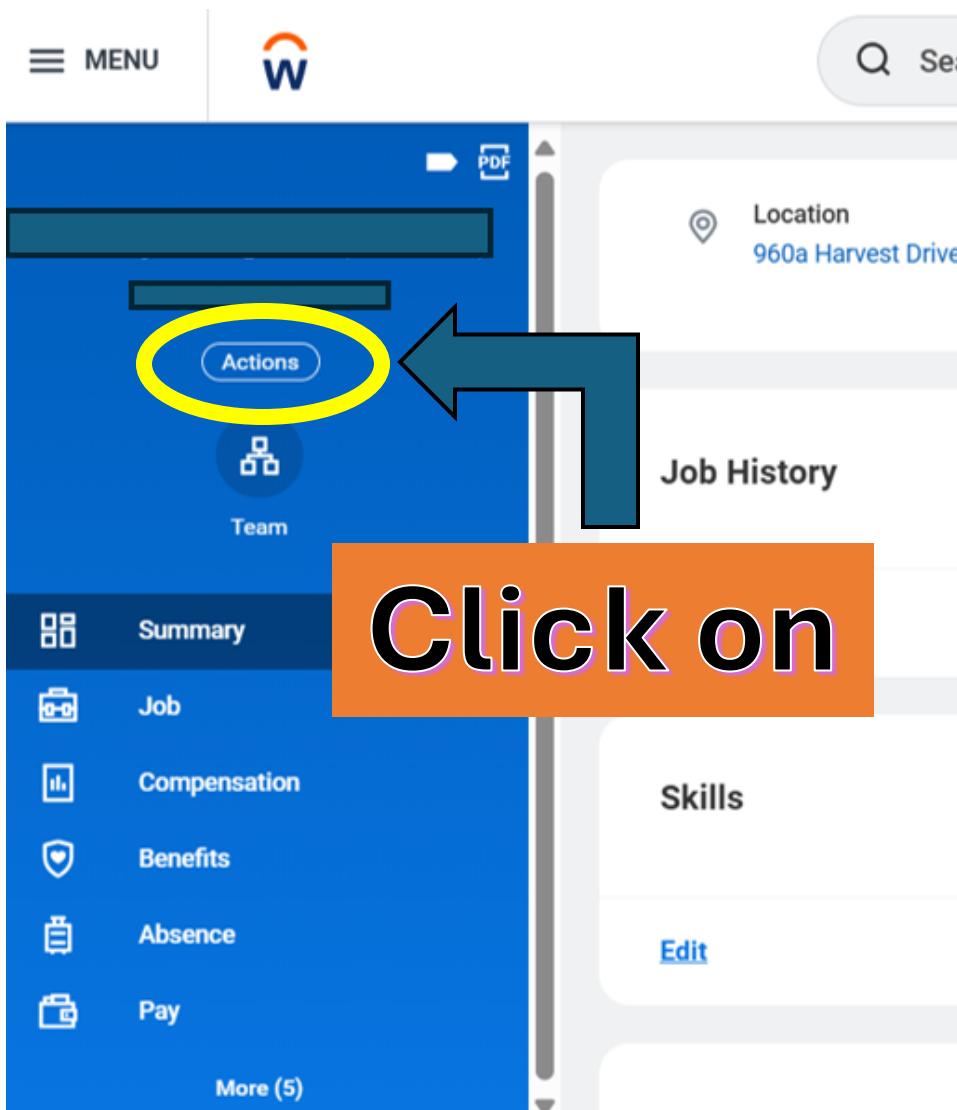
PTO Requests and Approvals



When should Time off be entered in Workday

- All time off request can begin to be entered in Workday starting today, Tuesday 7/1 our go live date.
- Time off benefit balances have already been imported into the system and available for review and request.
- If you have already received and approved time off beginning 6/22 for the Nursing pay group and 6/23 for all remaining staff and the time has been entered in Kronos you are going to be asked to re-enter that time in workday.
- Time off will not be used for payroll processing form hours entered in Kronos.

How to request PTO using action

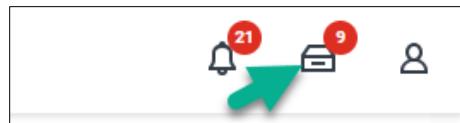


Note: To view Profile for a member of your team:

Click their name in "Team Highlights" area OR Type team member's name in the Search bar

Approving Time Off in Workday

1. Navigate to Workday and click on **Mail / Task** icon.



2. Select the applicable inbox item. Review Absence details and click **Approve**. The Absence request can be Denied or Sent Back to the employee for revision.



All Items 9 items

Search: All Items

[Advanced Search](#)

Absence Request: ☆

Due: 05/16/2025
Effective: 06/17/2025

Review Absence Request: ...

For: Overall Process: Absence Request: Overall Status: In Progress

Due Date:

Details to Review

First Day of Time Off: 06/17/2025
Last Day of Time Off: 06/18/2025
Total: 16 hours - Jury Duty

Request Details 2 items

Date	Day of the Week	Type	Requested	Unit of Time
06/17/2025	Tuesday	Jury Duty	8	Hours
06/18/2025	Wednesday	Jury Duty	8	Hours

[View Balances](#)

Approve **Send Back** **Deny** **Cancel**

Time Tracking



Leveraging Time Tracking via Kronos and Workday

**Review, Edit
and Approve
Absence
request in
Workday for all
Workers**



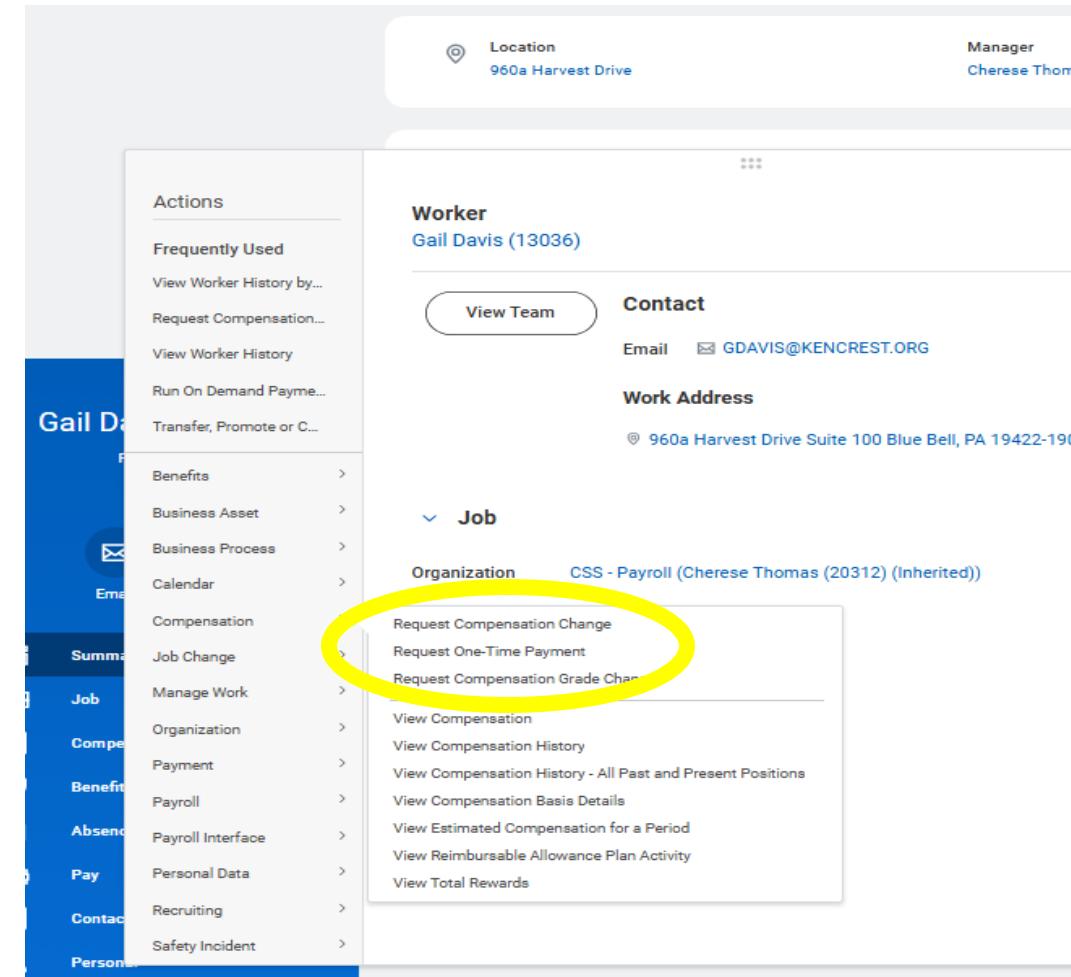
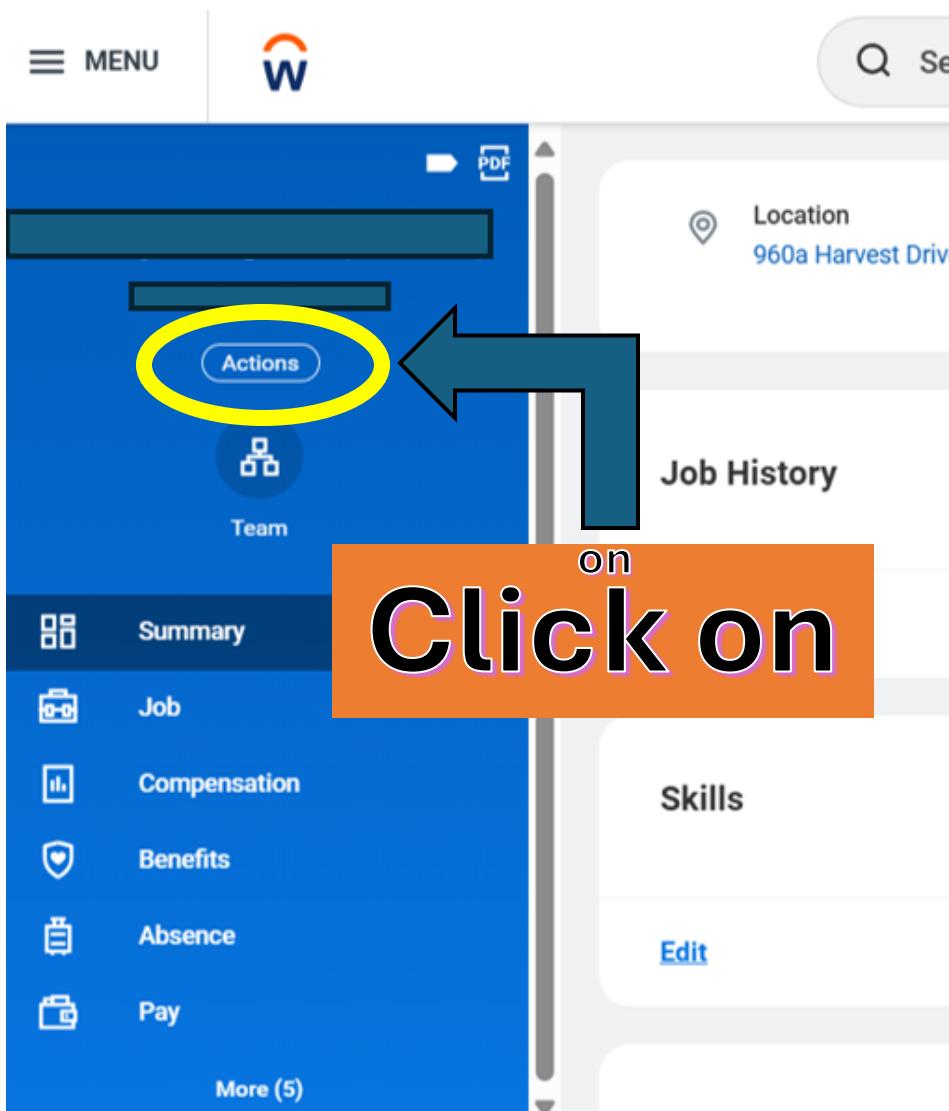
**Add PTO/DTO/LTM
that has been
approved in
Workday to the
Kronos timecard
for Hourly staff to
populate pay
period totals.**

**Review, Edit
and Approve
Hourly
Workers
timecards in
Kronos**

One Time Payment



Request from Worker Profile



Note: To view Profile for a member of your team:

Click their name in "Team Highlights" area OR Type team member's name in the Search bar

QUESTIONS?

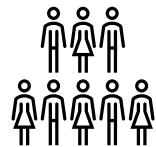
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RECRUITING & ONBOARDING



What Managers Handle in Workday for Recruiting



Starting Job Requisitions



Keep Outlook Calendar Updated for Interviews

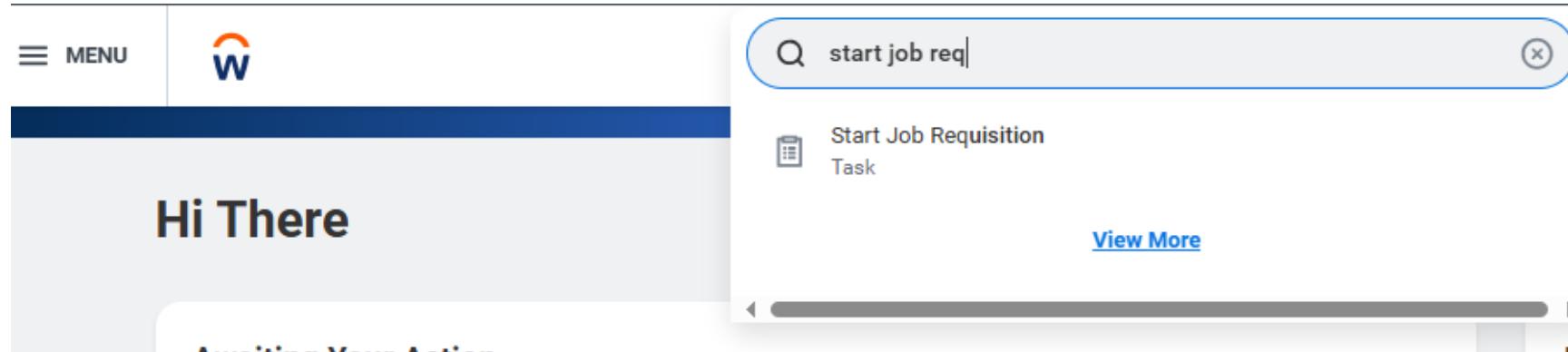


Review Offer Letters

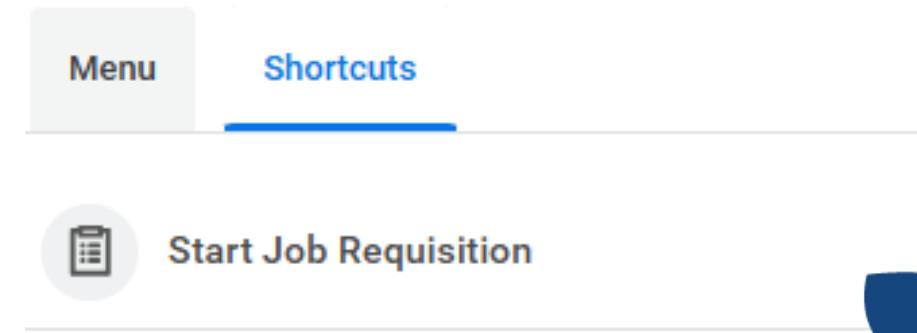


Starting a Requisition

Method 1: *Type in Search Bar “Start Job Req”*



Method 2* (recommended):
Add to Shortcuts under Menu



Starting a Requisition

Job Details

Enter the recruiting and job details for the job posting to get approval and begin the hiring process.

Basic Information

What supervisory organization is this job for? *

PA - Region 1 - Western -
Homes (Asia Berry (19876)) ... ≡

This job will *

- replace a worker
- add a worker



Replacing A Worker

Recruiting Details

Reason *

x Recruiting > Resignation



Choose Reason

Replacement For

x Kate Spade (Terminated)
(100030)



Will auto populate person being replaced if termination

Recruiting Instruction

select one



Recruiting Start Date *

05/26/2025



Target Hire Date *

05/26/2025



Choose date you are creating the requisition in both fields

Target End Date

MM/DD/YYYY



Start

Recruiting Information

Job

Skills

Qualifications

Organizations

Attachments

Compensation

Assign Roles

Summary

Back

Next

Job Details

Job Posting Title *

PA - Region 2 - Delaware\Chester - Homes - Direct Supp

Justification

Job Profile *

Direct Support Professional

Additional Job Profiles

Job Description Summary

Job Description

Additional Job Description

Job Families for Job Profiles

Worker Sub-Type *

Regular

Time Type *

Full time

Primary Location *

21 Carrigan Avenue

Primary Job Posting Location *

CHESTER DELAWARE RESIDENTIAL - Spring City

Additional Locations

Additional Job Posting Locations

Scheduled Weekly Hours

35

Work Shift

Attachments

Compensation

Assign Roles

Summary

Compensation Package

- General Compensation Package added

Compensation Grade

- 11.0_H added

Compensation Grade

- 11.0_H added

Salary

Add

Hourly

Assignment Details

- 0.00 USD Hourly assigned

Plan Name

- Hourly Plan added

Effective Date

- 05/26/2025 added

Assign Roles

Guide Me

Role *

Primary Recruiter



Assigned To *

Director of Talent Acquisition

and Onboarding - Jaclyn
Greenberg (22481)



Add

Additional Data*

Edit Additional Data

Job Requisition: JR100232 PA - Region 2 - Delaware\Chester - Homes - Direct Support Professional 21 Carrigan DSP3 ...

Custom Object Work Schedule

Instructions

Please enter work schedule in the EXACT
WEEK 1: DAY, Start Time (a/p) – End Time
WEEK 2: DAY, Start Time (a/p) – End Time

Work Schedule

Work Schedule *

Edit Additional Data

Job Requisition: JR100232 PA - Region 2 - Delaware\Chester - Homes - Direct Support Professional 21 Carrigan DSP3 ...

Custom Object Skill Level Requirement

Instructions

This role has a KenCrest-specific skill level requirement. Please input one of the following options:

- Base
- Mid
- Advanced

Skill Level Requirement

Skill Level Required *



Creating A Position* through Job Requisition



Basic Information

What supervisory organization is this job for? *

CSS - Recruitment (Jaclyn Greenberg (22481))

This job will *

- replace a worker
- add a worker



Is there an existing position for this job? *

- Yes
- No, create a new position for this job

How many openings are there for this job?

1

In this context a Position means a “Seat on the Bus”



x KCS KenCrest Services ...

Select a cost center *

x 99156 Recruitment ...

What location is this job based in? *

Suggested for you 1013 E. Mt Pleasant Avenue 1113

Add additional locations

Are you hiring a new employee or contingent worker? *

Employee

Contingent Worker

What is the time type for this job? *

Full time

Part time

Recruiting Information

When would you like this worker to start?

As soon as possible

Select Date MM/DD/YYYY

What recruiting instruction do you have?

select one

Select a primary location to post this job

Suggested for you 104 Deer Ln M/

Why are you creating this job? *

x Recruiting > Growth ...

Search

[← Create Job Requisition >](#)

[Recruiting](#)

Recruiting > Growth

- Recruiting > New Location
- Recruiting > Post Internally Only
- Recruiting > Replacement for Promotion
- Recruiting > Replacement for Transfer
- Recruiting > Resignation
- Recruiting > Termination

Final Steps in Business Process for Create Position through a Job Requisition

Requisition is Submitted

Your Supervisor Approval

HR Approval

Back to Initiator:

- Compensation (Salary/Hourly)
- Assign Recruiter
- Cost Allocation (if any)

Recruitment Posts Job



Skip the Scheduling Headache Let Workday Do the Work!

Schedule Interview Natasha Romanoff - Direct Support Professional - Philadelphia/Bucks (C100127)

Date *

07/07/2025 

Time Zone *

 GMT-05:00 Eastern Time (New York) 

1 item

	Order	*Interviewers	*Duration (in minutes)		Notes
		 Valerie Van Kirk (11861) 	 45 	<input type="radio"/> Phone <input type="radio"/> In Person <input type="radio"/> Video <input type="text" value="Search"/> 	 for Ramsey 

Recommended Interview Settings

Earliest Start Time *

09:00 AM



Latest End Time *

05:00 PM

Range of Dates *

Selected Interview Day

1 Week

2 Weeks



Days of the Week



Next

Cancel

Recommended Times

X



1 item

Interviewers	Time	Location
Valerie Van Kirk (11861)	10:00am - 10:45am	

Monday, July 7, 2025 (1:00pm - 1:45pm)



1 item

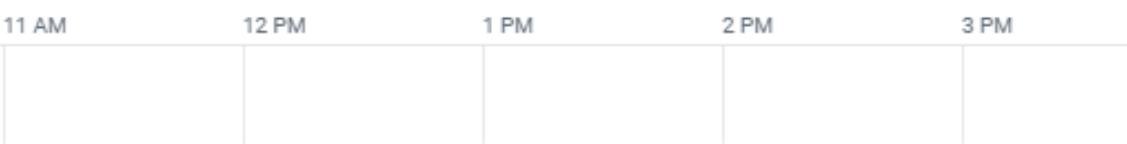
Interviewers	Time	Location
Valerie Van Kirk (11861)	1:00pm - 1:45pm	

Tuesday, July 8, 2025 (10:00am - 10:45am)



1 item

Next Support Professional - Philadelphia/Bucks (C100127)



Cancel

OK

Schedule

Back

Next

Cancel

Schedule Interview Natasha Romanoff - Direct Support Professional - Philadelphia/Bucks (C100127)

Proposed Interview Schedule

1 item

Interviewers	Start Time	End Time	Location	Interview Type
Valerie Van Kirk (11861)	07/07/2025 1:00 PM	07/07/2025 1:45PM		In Person

Additional Options

Do not send email

Time Zone

GMT-05:00 Eastern Time (N

Upload either DOC, DOCX, HTML, PDF, or TXT file types (5MB max)

Subject

Interview with Natasha Ro
(Evergreen)

Body

Drop files here

or

Select files

Submit

Back

Save for Later

Cancel

Let's Focus on You

Notifications

Viewing: All ▼ Sort By: Newest ▼

From Last 30 Days

Interview with Natasha Romanoff (C100127) for Direct Support Professional - Philadelphia/Bucks (Evergreen)

Interview with Natasha Romanoff (C100127) for Direct Support Professional - Philadelphia/Bucks (Evergreen)

4 minute(s) ago

Interview with Natasha Romanoff (C100127) for Direct Support Professional - Philadelphia/Bucks (Evergreen)

4 minute(s) ago

[View Candidate](#)



Give Interview Feedback

Natasha Romanoff

For: Direct Support Professional - Philadelphia/Bucks (Evergreen)



Overall Feedback

Overall Rating *

select one

select one

3 - No - Please disposition

2 - Consider for alternate opportunity

1 - Yes - Please move forward

Overall Comment *

must have a value.



Review Propose Compensation: Natasha Romanoff - 5703 PA - Region 2 - Philadelphia & Bucks - Homes - Direct Support Professional 508 Ramsey Rd DSP3 (C100127) ...

Plan Assignments 1 item

Plan Type	Plan Name	Proposed Change
Hourly	Hourly Plan	16.00 USD Hourly

enter your comment



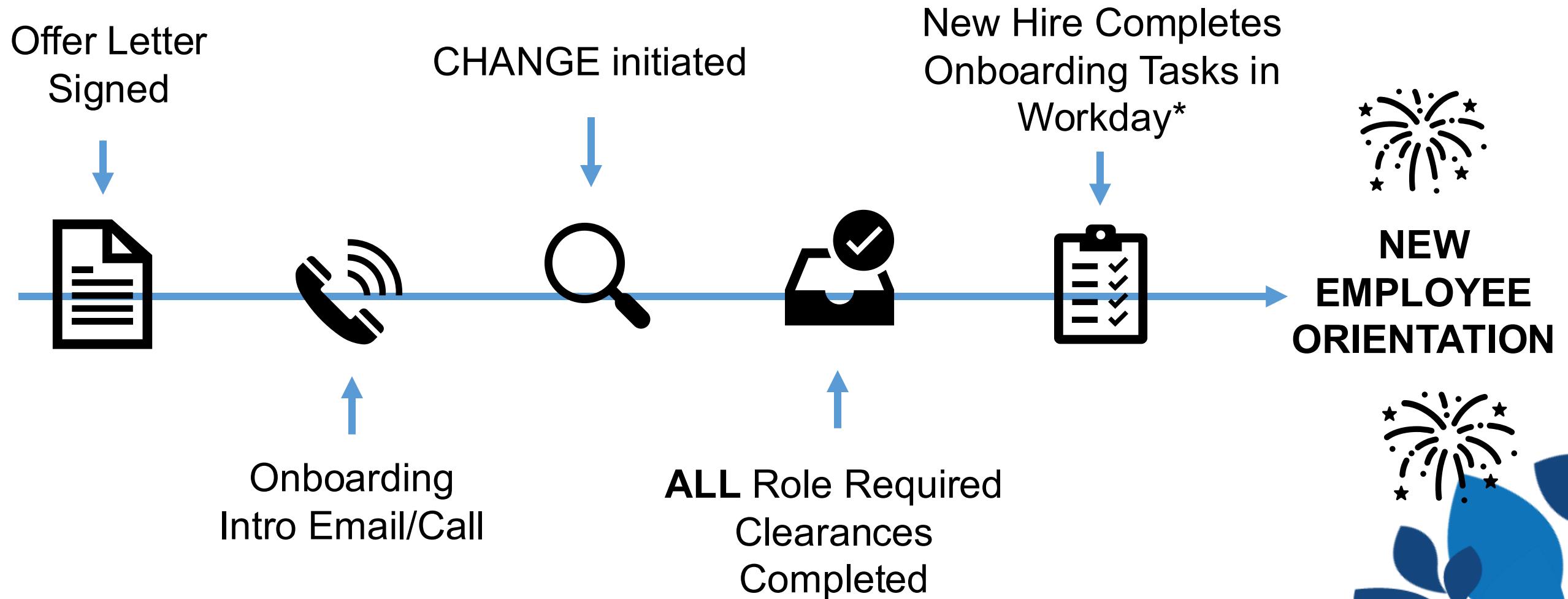
Approve

Send Back

Cancel



Brief Overview of Onboarding Process



QUESTIONS?

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HR – PEOPLE MOVES & TERMINATIONS



Business Process (BP)

A set of steps that define how tasks like hiring, promotions, or personal info changes are reviewed and approved in Workday.

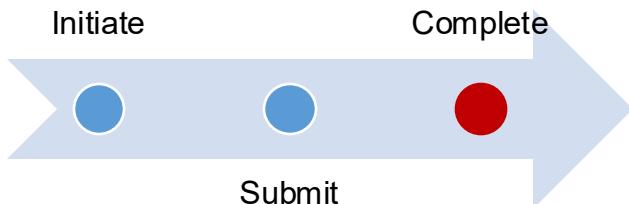
Similar process in DayForce: Workflows.



Business Process (BP)

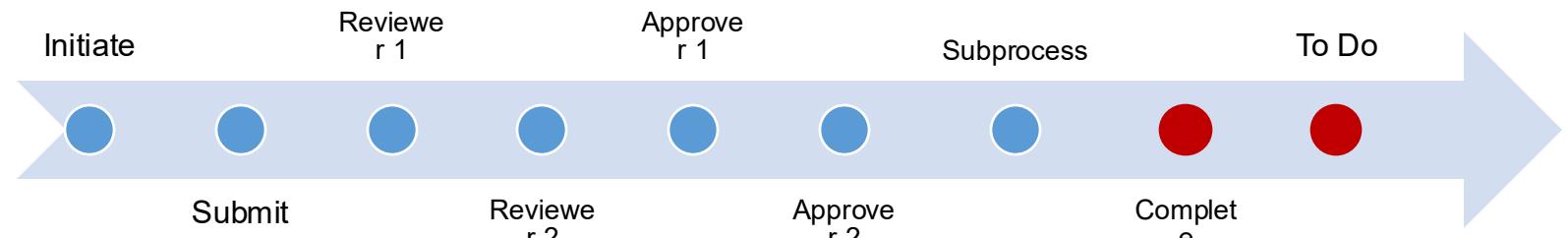
SIMPLE

Auto-completing BPs



COMPLEX

BPs with steps to completion



- Change in proposed state
- Change written in Workday

BP Managers may Initiate

Transfer,
Promote or
Change Jobs

Change Job
Details

Change
Location

End a job
(second Job)

Make a New
Manager

Add a Job
(second Job)

Terminate
Employee



HR - Business Process (BP)

Let's Get Started

Awaiting Your Action

Background Check for Job Application: Mia Hamm - 4565 PA - Region 1 - Western MC - Homes - Direct Support Professional - 3966 Yerkes Road DSP3 (Open)
My Tasks - 2 day(s) ago

Get Applicant authorization to initiate Background Check/s: Offer for Job Application: Mia Hamm (Referral) - 4565 PA - Region 1 - Western MC - Homes - Direct Support Professio...
My Tasks - 2 day(s) ago
DUE 06/05/2025

Important Dates

JUN Holiday 19 Juneteenth

JUL Holiday 4 Independence Day

Go to Team Calendar

All Items 62 items

Search: All Items Advanced Search

Job Requisition: JR100225 ELC Administrative Assistant 06/05/2025 ★
Effective: 06/05/2025

Background Check for Job Application: Mia Hamm - 4565 PA - Region 1 - Western MC - Homes - Direct Support Professional - 3966 Yerkes Road DSP3 (Open) 06/02/2025 ★

Get Applicant authorization to initiate Background Check/s: Offer for Job Application: Mia Hamm (Referral) - 4565 PA - Region 1 - Western MC - Homes - Direct Support Professional - 3966 Yerkes Road DSP3 (Open) 06/02/2025 ★

Review Changed Role Assignments

Created: 06/05/2025 | Effective: 06/05/2025

Effective Date 06/05/2025

1 item

Role Enabled For	Role
JR100225 ELC Administrative Assistant (Open)	Primary Recruiter

enter your comment

Process History

Lana Roegner (31332)

Created: 05/16/2025 | Due: 05/18/2025 | Effective: 05/15/2025

Review Photo Change: Sleeping Beauty-test (100061) ...

For Sleeping Beauty-test (100061)

Overall Process Photo Change: Sleeping Beauty-test (100061)

Overall Status In Progress

Due Date 05/18/2025

Details to Review

Current

No current photo.

Proposed

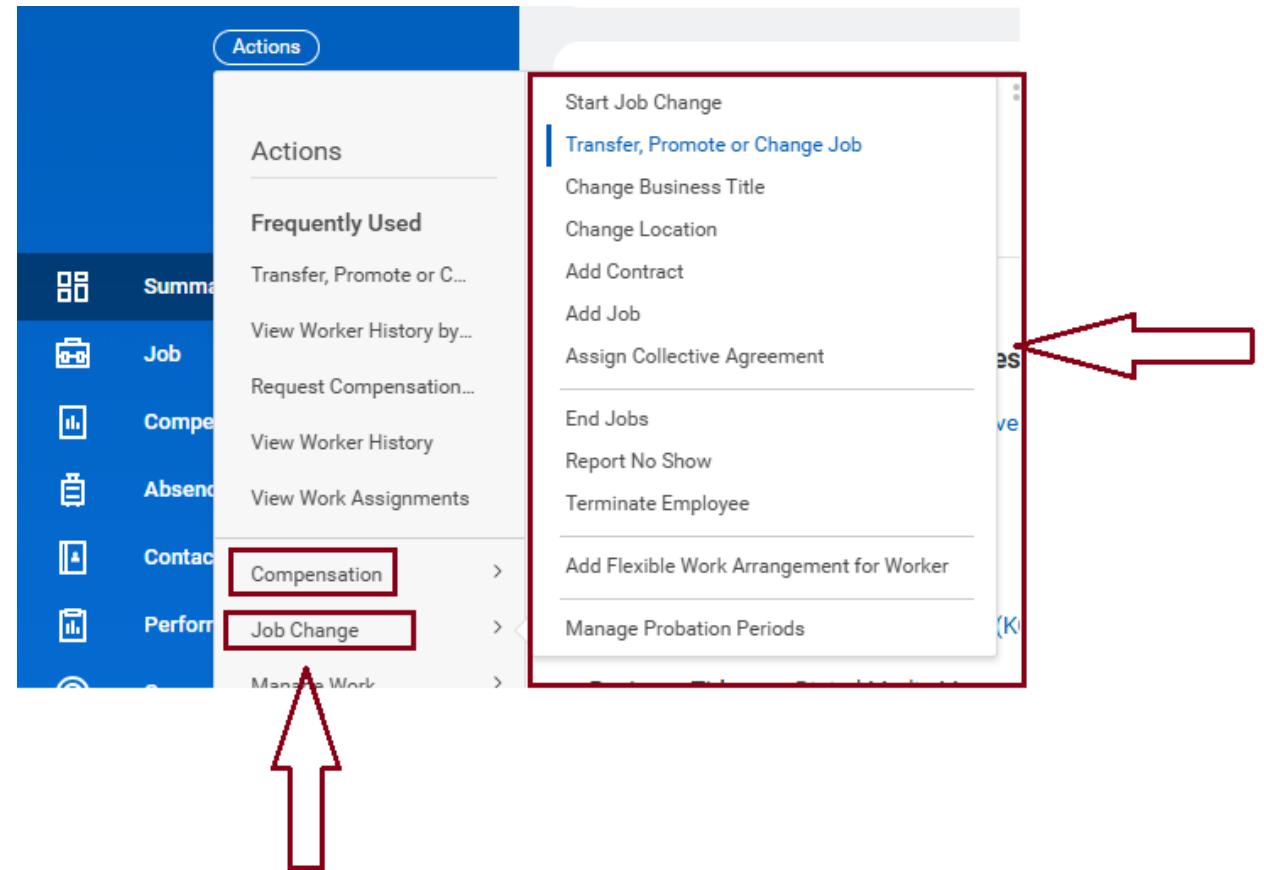
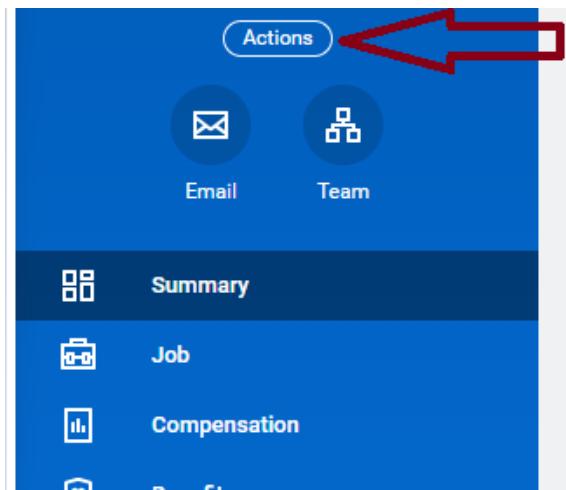


Approve Send Back Deny Cancel

Change Job

(change job, location, promote, request transfer etc)

- Start at the employee profile and click on Related Action button
- Select applicable action
- Fill out form and click Submit



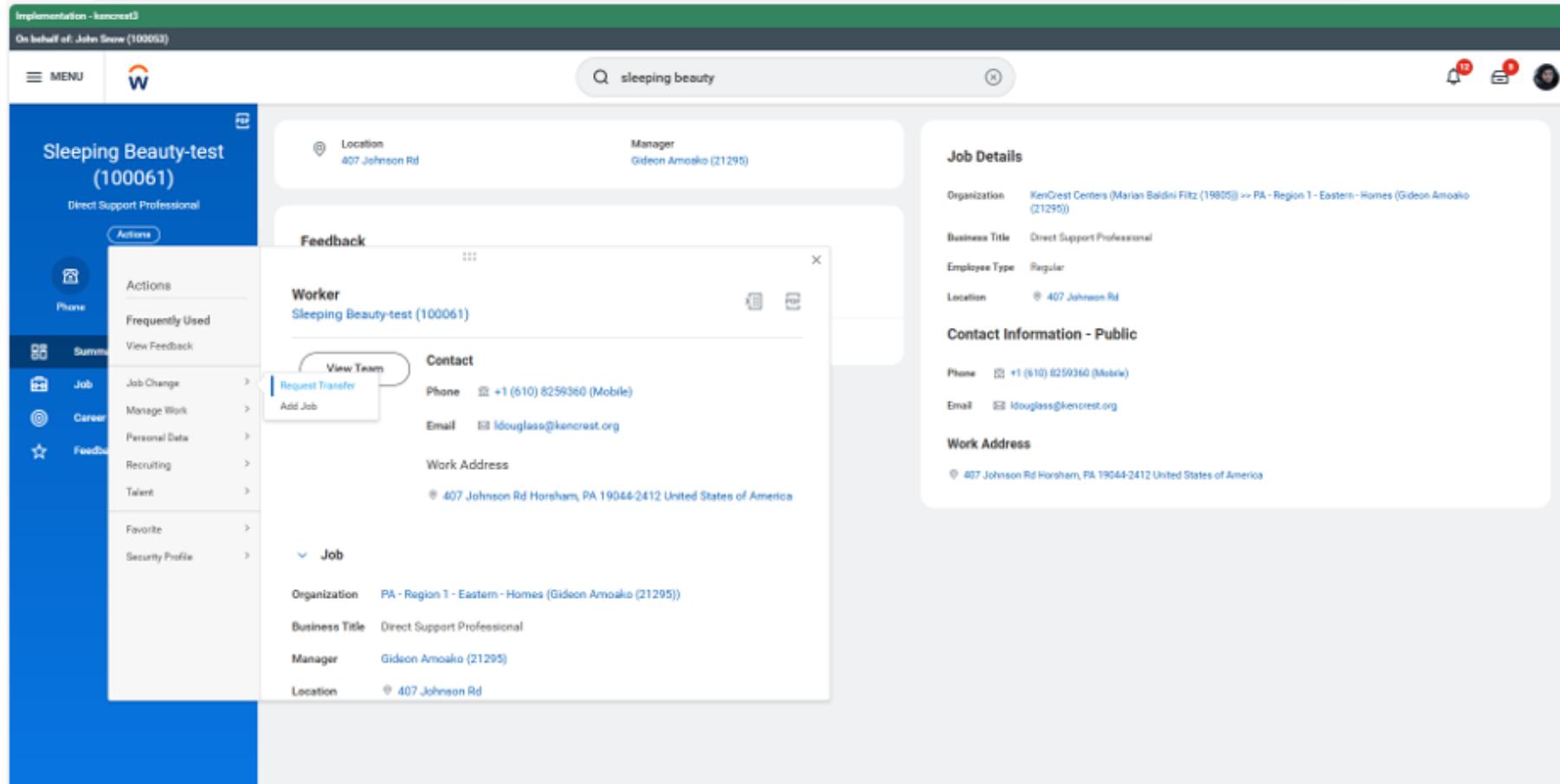
Change Job Reasons

(Appendix)

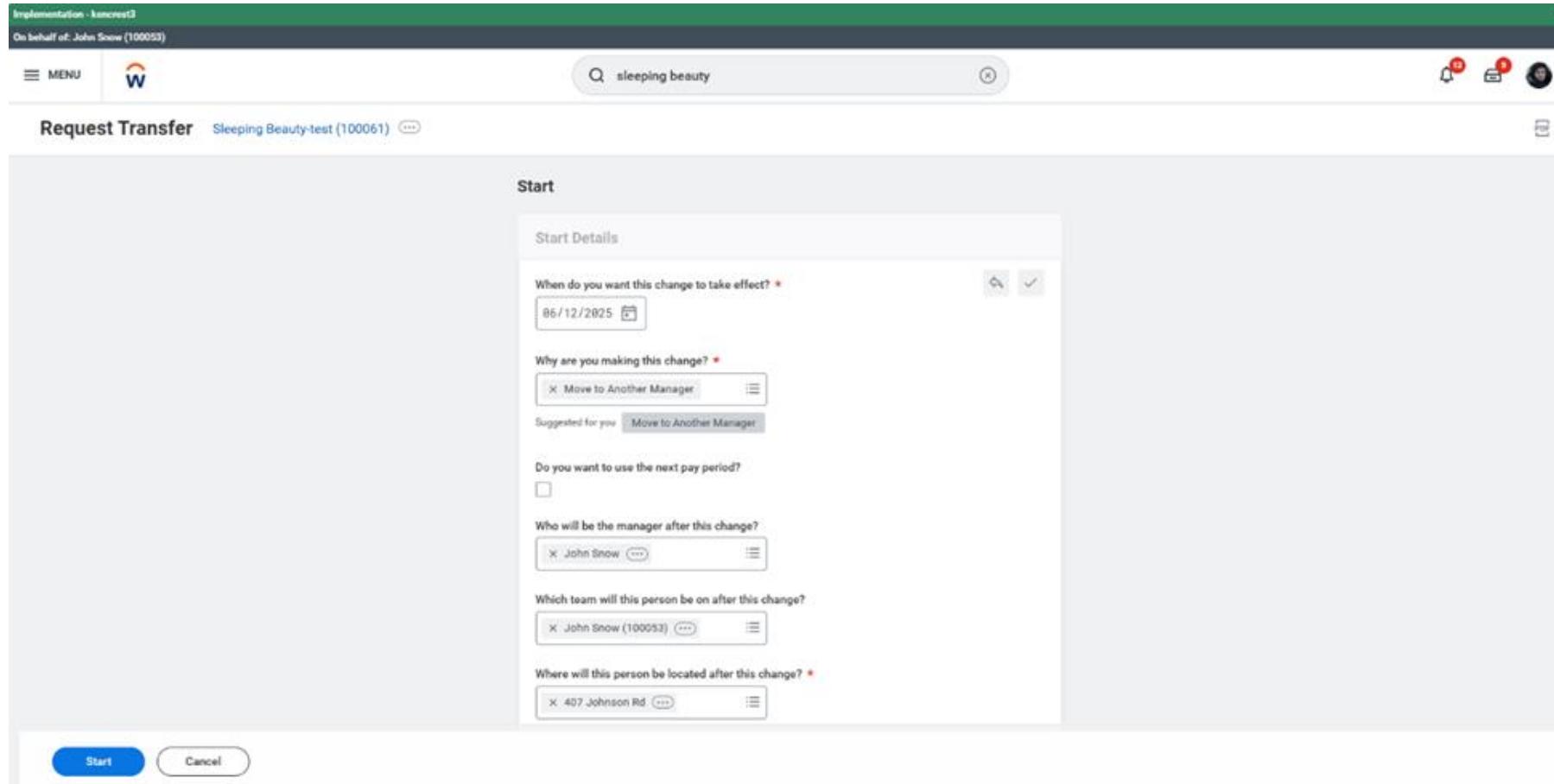
Position Change	Demotion	Decrease in Responsibility Demotion
	Department/Location Change	Move to another Department Move to another Location
	Data Changes	Change Job Details Change Contingent Worker Details
	Promotion	Make New Manager Received Certificate/Degree Promotion
	Lateral Move/Position Change	Move to Another Position on My Team Transfer to Another Position
	Hours Changes	Change in Hours Change to Full-Time Status Change to Part-Time
	Corrections and Data Changes	Correct Position Entry Date Correction-Department Correction-Job Code Correction-Pay Rate Correction Correction - Location Change



Request Transfer



Request Transfer



Termination

From an employee's profile:

1. Select the **Actions** button.
2. Select **Job Change > Terminate Employee** to display the Terminate Employee page, as shown in the image below.

The screenshot shows the Workday employee profile for Brian Kaplan. The profile card includes a photo, the name 'Brian Kaplan', and the title 'Senior Customer Services Representative'. A blue 'Actions' button is visible. A dropdown menu titled 'Actions' is open, listing various options: Benefits, Business Asset, Business Process, Calendar, Committee Membership, Compensation, Expenses, Help, Job Change, Manage Work, Organization, Payment, and Payroll. The 'Job Change' option is expanded, and the 'Terminate Employee' option is highlighted with a purple box. The main content area shows 'Location Chicago' and 'Manager Amelia Casias'. Below the menu, there is a list of phone numbers and an email address: '315-423-5872 (Mobile)', '315-423-5872 (Mobile)', 'aplan@workday.net', and '1 Randolph Street Chicago, IL 60605 United States of America'. At the bottom, there are links for 'Instant Messenger' and social media icons for Facebook, LinkedIn, and Twitter. The footer shows 'Time in Inh Profile 15 year(s), 2 month(s), 27 day(s)'.

Termination Reasons

(Appendix)

Category	Subcategory
Termination No Start	Employee did not start- Did not complete onboarding Employee did not start- Decided not to accept positon <ul style="list-style-type: none"> • Resignation – New Job Proper Notice Given • Resignation -Personal Reasons Proper Notice Given • Resignation -Retirement • Resignation - Position did not meet expectations • Resignation – Improper notice Resignation - Job Dissatisfaction
New Hire Did not Pass Probation	<ul style="list-style-type: none"> • New hire did not pass probation within first 90 days – Attendance • New hire did not pass probation within first 90 days –Job Performance • New hire did not pass probation within first 90 days –Violation of Policy • New hire did not pass probation within first 90 days – Job Abandonment • Perfomance – Unsatisfactory Job Performance • Perfomance– Excessive Absenteeism • Perfomance– EE Violated Agency Policy • Perfomance– Failed PIP Probationary Review
Performance	<ul style="list-style-type: none"> • Lack of Work • Job Abandonment • Did not return from leave of absence
Lay Off	<ul style="list-style-type: none"> • Lack of Work
Job Abandonment	<ul style="list-style-type: none"> • Job Abandonment
Did not meet job requirements	<ul style="list-style-type: none"> • Did not meet job requirements - EE Did not pass recent background check • Did not meet job requirements -EE Does not have valid license • Did not meet job requirements -EE Did not meet PRN status requirements
Death	Death
Assignment Ended	Assignment Ended

Resignation	<ul style="list-style-type: none"> • Resignation – New Job Proper Notice Given • Resignation -Personal Reasons Proper Notice Given • Resignation -Retirement 	Eligible
Lay Off	<ul style="list-style-type: none"> • Lack of Work 	Eligible
Death	Death	Eligible



Need Data / Reports?

- Reports are available for Managers to run
- If you require any report customization or you cannot locate a report you need, reach out to workdaysupport@kencrest.org, please put “Report” in the subject line.
- Useful reports:
- **My Workers** - View a list of workers who report to you, either directly or as part of a matrix organization. Details include worker name, reporting type, position, organization, public contact information, and business site. Enables you to view the names, positions, and locations of your workers.

My Workers ... ⋮⋮⋮

Reporting Type Either

2 items

Worker	Reporting Type	Position and Job - All Staffing Models	Supervisory Organization	Public Phones	Public Email Addresses	Location
Gandalf Gray (100058)	Direct	Direct Support Professional - Gandalf Gray (100058)	John Snow (100053)	+1 (215) 3111515 (Mobile)		109 Meadow Lane
Sleeping Beauty-test (100061)	Direct	Direct Support Professional - Sleeping Beauty-test (100061)	John Snow (100053)	+1 (610) 8259360 (Mobile)	ldouglass@kencrest.org (Sleeping Beauty-test)	407 Johnson Rd

Useful Reports

- **Headcount Report** - View a list of worker headcount in an organization. Enables you to drill down on the numbers to create summarizations by category. Details include summary counts of workers, positions, hours, and jobs.

Headcount Report [John Snow \(100053\)](#)   

View As Of 06/16/2025

Include Subordinate Organizations Yes

[Workers](#) [Positions](#)

Workers 2 items

Organization	Workers	Active Employees	Inactive Employees	Contingent Workers
John Snow (100053)	2	2	0	0
Total:	2	2	0	0

- **My Team Anniversaries with Continuous Service Date** - View a list of worker anniversaries in the next two weeks based on continuous service date. Details include the date of the next anniversary and the worker name.
- **My Team Birthdays** - Provides managers with a list of worker birthdays coming up in the next 2 weeks within the supervisory organization.
- **Personal Details** - This report includes standard Workday-delivered **personal details** for workers.
- **My Team's Upcoming Time Off** - Displays workers in your supervisory organization with approved time off in the next 7 days. Does not include workers on Leave of Absence or unapproved time off.

QUESTIONS?

Please type your questions in the chat.

We will do our best to answer them here in the call and/or will add them to the FAQs if we are limited on time.



HR – TALENT



Workday Talent Sneak Peek...

Communication Aids:

- Check-ins
- Feedback – Giving & Receiving

Talent Development Tools:

- Mentorship
- Reviews-Development Plans
- Certifications
- Succession Planning
- Assessing Potential
- Talent Pools



Performance Management

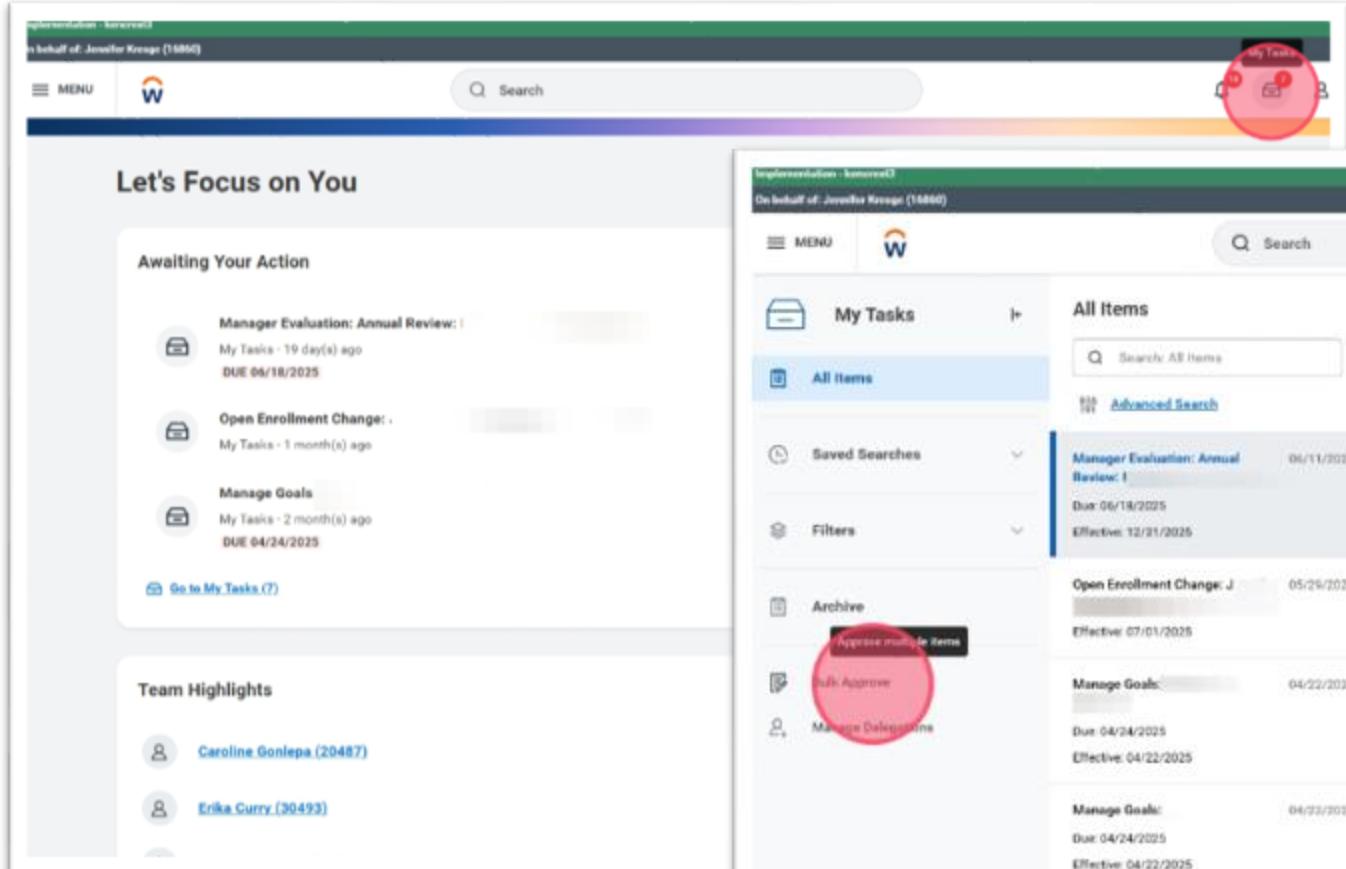


Performance Management Tools:

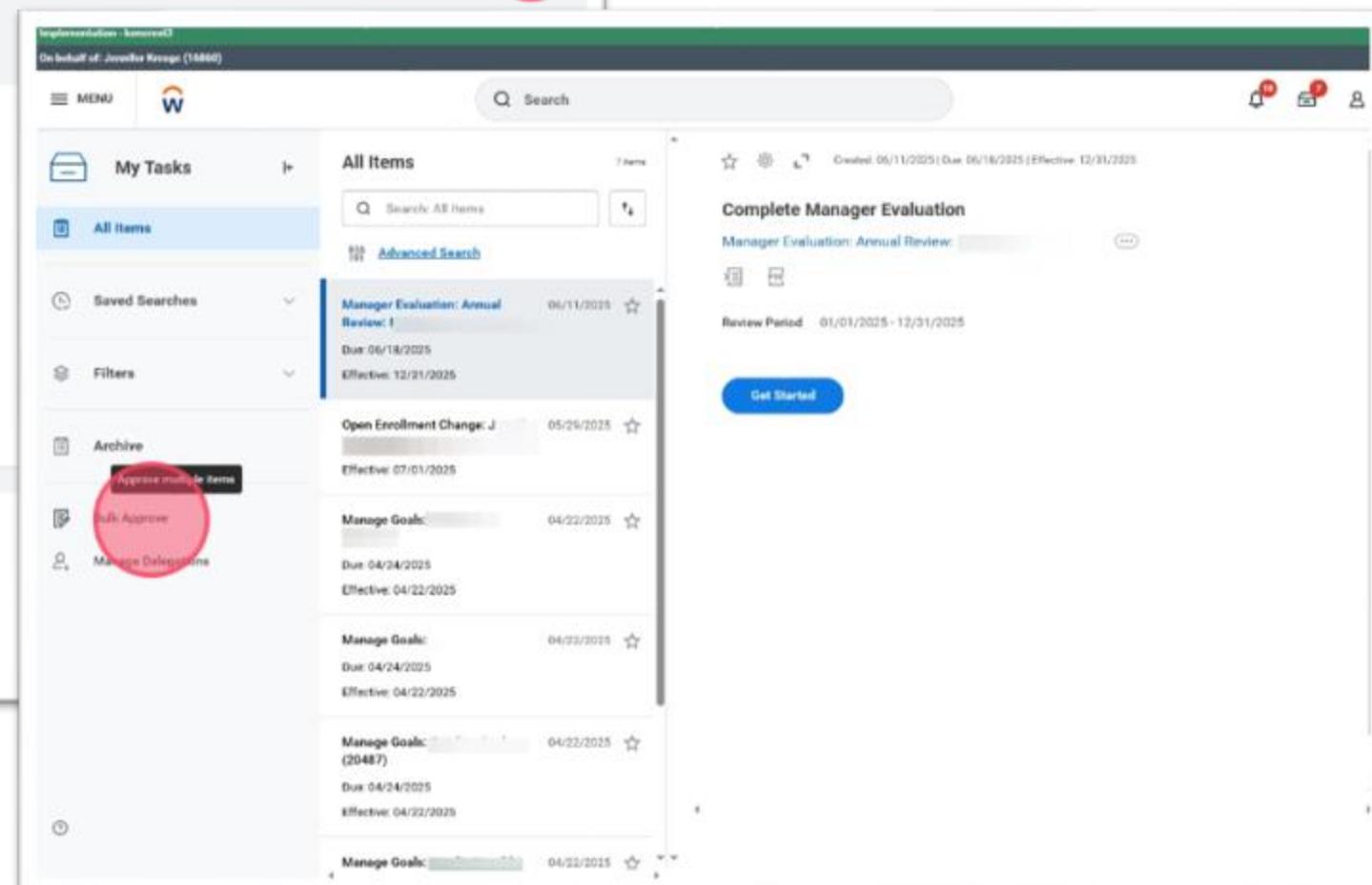
- Goals – Individual and Agency
- Reviews - Annual Performance
- Reviews – Development Plans
- Reviews – 30,60,90-Day Probationary
- Reviews – PIPs

Bulk Approving Team Goals

1. Click on Mailbox Icon



2. Click on "Bulk Approve"



3. Click on the "Task" box as show to select all pending tasks for approval.

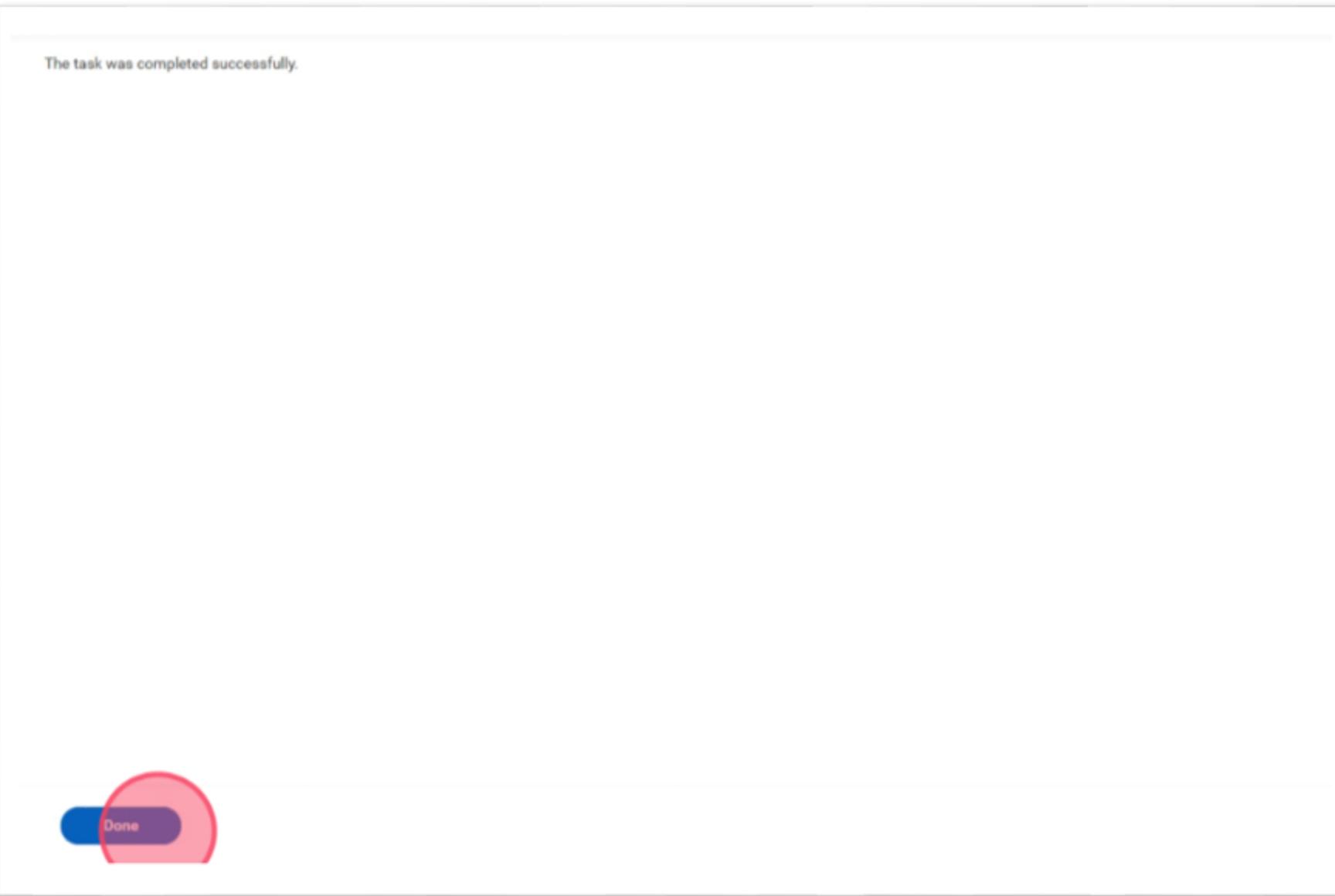
The screenshot displays a 'Bulk Approve' interface. At the top, there is a navigation bar with 'MENU', a logo, and a 'Search' field. Below the navigation bar, the title 'Bulk Approve' is visible. On the left, a sidebar shows a list of items with checkboxes, and one item is highlighted with a red circle. The main area shows a table with the following data:

Viewing: 4 items 4 selected	Title	Due Date	Overdue	Submitted Date	Details
	Manage Goals: [REDACTED]	04/24/2025	<input checked="" type="checkbox"/>	2 month(s) ago - Due 04/24/2025; Effective 04/22/2025	Details
	Manage Goals: [REDACTED]	04/24/2025	<input checked="" type="checkbox"/>	2 month(s) ago - Due 04/24/2025; Effective 04/22/2025	Details
	Manage Goals: [REDACTED]	04/24/2025	<input checked="" type="checkbox"/>	2 month(s) ago - Due 04/24/2025; Effective 04/22/2025	Details
	Manage Goals: [REDACTED]	04/24/2025	<input checked="" type="checkbox"/>	2 month(s) ago - Due 04/24/2025; Effective 04/22/2025	Details

At the bottom, there are 'OK' and 'Cancel' buttons. A red circle highlights the 'OK' button.

4. Click "OK" to approve selected tasks.

5. Click "Done". The tasks have been completed.



You will receive a confirmation email for each employees' goals you approve.

[EXTERNAL] Pamela Schaefer (17568) has created a new Goal.



The image shows an email interface with the following details:

- From: kencrest@myworkday.com (represented by a blue circle with a white 'K')
- To: Michelle Francis (represented by a green circle with a white person icon)
- Date: Tue 6/24/2025 3:24 PM
- Toolbar icons: smiley face, reply, reply all, forward, attachments, and more

You don't often get email from kencrest@myworkday.com. [Learn why this is important](#)

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe. If you suspect this is a fraudulent email, please submit this message for review using the phishing alert button located in the toolbar.

Pamela Schaefer (17568) has created the following Goal: Accountability

[Click here to view the notification details.](#)

This email box is not monitored. Please do not reply to this message

QUESTIONS?

Please type your questions in the chat.

We will do our best to answer them here in the call and/or will add them to the FAQs if we are limited on time.



WHAT'S NEXT?



Where to get help

<https://www.kencrest.org/workday>

- Job aids & Videos
- FAQs
- Glossary
- Future Trainings & Training Recordings (Relias)
- Office Hours - July 8, 9, 10 (1-2:30pm)
- Change Champions
- Just try it!
- Support Model – helpdesk.kencrest.org or email WorkdaySupport@kencrest.org



Where to get help – helpdesk.kencrest.org

Help Request

Request Type

Request Detail

- DayForce Support
- Evolv Support
- IT Request
- IT Support
- Relias Support
- Workday Support

Location

Save

Help Request

Request Type

Request Detail

- Finance
- HR
- Payroll

Attachments

Location

Save

- OR email WorkdaySupport@kencrest.org

Where to get help – helpdesk.kencrest.org

Help Request

Request Type

Request Detail

Location

Request Type: **Workday Support**

Sub Type: **Finance OR HR OR Payroll**

Request Type: **IT Support**

Sub Type: **Software**

Sub Type: **Workday Technical Support**

- OR email WorkdaySupport@kencrest.org

Who is my Change Champion?

Program	Identified Champion(s)
Delaware State – Adults	Grace Hodge
Connecticut	Michelle Pych
Pennsylvania Birth to Five	Christina Waldron
Delaware Birth to Five	Michele Bailey
Clinical Services	Autumn Miller & Nicole Briggs
Early Learning Centers in Philadelphia	Christina Stiles & Wil Padilla
Children's Transitional Homes	Ivan Johnson
Community Medical Homes	Dakota Trent
Supported Independent Living	Martaya Nelson-Rainey
Quality Outcomes Specialists	Ariana Forbes
PA Homes – Eastern Montgomery County	Maame Afia-Baah, Ryan Abner, Sydney Clark, & Edward Robinson

Program	Identified Champion
PA Homes – Western Montgomery County	Jean Dantica, Kimberly Royster, Nadia Aitammi, & Sisa Ncube
Lifesharing	Angela Weir
Community -Based Services	Katie White
Employment Services	Demir Moore
Quality Outcomes Specialists	Sharnese Jones
PA Homes – Chester County	James Carter, Courtney Hemingway, Delphine Johnson & Sylinda Butler
PA Homes – Philadelphia and Upper Bucks County	Tia Gibbs, Erika Curry, Michelle Golas, & Sumaro Dorleh
Scheduling Department, IT, ET & Nursing Coordination	Amanda Vani
Facility Management, Billing and Revenue Cycle Department, Philanthropy & Executive Office	Hannah Simons
Incident Management, Corporate Finance & Human Resources	Diana Crothers

Team lead: Sheetal Manglani, Melissa Bailey-Raison, Karen Latimer, Beth Tavenner

Coming up July



Let the games begin!

Join us for a fast-paced, fun-filled round of **Workday Jeopardy** — where your knowledge could win you bragging rights and prizes!

Test your skills

Team up with colleagues

Compete for glory



Sign up by July 21st to secure your spot!

Dates:
July 24 12–1 PM
July 27 12–1 PM
Aug 7 3–4 PM

Location: Virtual Teams Meeting

Audience welcome to sign up as well!

\$100 gift cards for all winners

Games Coordinators

Erika Curry	Sisa Ncube	Angela Weir
Katie White	Tia Gibbs	Karen Latimer
Melissa Bailey-Raison		Beth Tavenner
Sheetal Manglani		

Sign up using the QR Code or use the link
<https://insights.kencrest.org/s/r3a65w>

We will match you up with 2 other participants across the agency to form teams of 3.



NEXT STEPS

1. Watch for Communications
2. Get familiar with the Workday Landing Page
3. Validate your Information Starting July 3 and throughout July
4. Attend All Employee Training July 8 OR 9
5. Visit us during Office Hours – Additional dates will be communicated!
6. Attend a LIVE On-site event!



Feedback

Your opinion is important to us!

- Please take 3-4 minutes to complete this survey.
- Your feedback will help us design and customize courses in the future.
- This survey is anonymous.

OR use this link in your browser:

<https://insights.kencrest.org/s/eyvauw>

Join by QR code

Scan with your camera app



THANK YOU!!!

