EMPILOYEE SELF-SERVICE (ESS) TRAINING

February - 2016

Agenda

- Why Workday?
- Workday General Information
- Employee Self-Service
- Mobile Functionality
- Support/Help
WHY WORKDAY?

Current Module & Vendor Solutions
“The significant problems we face today cannot be solved at the same level of thinking we were at when we created them.”

–ALBERT EINSTEIN
Workday

Workday Functionality

- Personal Information
- Hiring
- Benefits
- Pay
- Time Off
Key Features

- **Employee & Manager Self Service**
  - Employees can update and maintain their personal information
  - Managers have easy access to employee data, all in one place
- **Mobile Solution**
  - Web-enabled devices - smart phone, tablets
- **Support**
  - Bring support expertise in-house
  - Flexibility with configuration and business processes
- **Transparency**
  - Increases efficiency in business decisions
  - Visibility into work force
- **Security**
  - Cloud based SaaS solution
  - Rules based processes
Logging In To Workday

The Workday at Ensign portal contains valuable Workday resources and the link to connect to the Workday application:

www.WorkdayatEnsign.com

1. Click on the Sign in to Workday button.

1. Enter User Name (Employee ID) and Password

Your password for the first time you log in to Workday will be: first 3 of your last name all CAPS+ 4 year DOB + !  e.g.  SMI1984!

3. Click Sign In

Workday General Information

Logging in to Workday
Worklets
Screen Elements
Task Elements
Home Page
Inbox, Actions and Archive
Notifications
Navigation: Worklets

Icons in Workday are called worklets and each worklet on your Home Page will allow you to access and manage important information.

Review this chart to become familiar with the worklets available on the Ensign Home Page.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Person Icon" /></td>
<td>The Personal Information Worklet allows you easy access to add and change your contacts, email and personal addresses.</td>
</tr>
<tr>
<td><img src="image2.png" alt="Pay Icon" /></td>
<td>The Pay Worklet allows you to update your withholding and payment elections and view pay slips and payment history.</td>
</tr>
<tr>
<td><img src="image3.png" alt="Benefits Icon" /></td>
<td>The Benefits Worklet allows you to view and manage important information regarding benefits and how to make benefit changes.</td>
</tr>
<tr>
<td><img src="image4.png" alt="Time Icon" /></td>
<td>The Time Worklet allows you to enter time several ways, view your time clock history and correct unmatched clock events.</td>
</tr>
<tr>
<td><img src="image5.png" alt="Time-Off Icon" /></td>
<td>The Time Off Worklet allows you to request time off and view your time off balances. Workday. The Archive tab is where you can view the status of your processes.</td>
</tr>
<tr>
<td><img src="image6.png" alt="Support/Help Icon" /></td>
<td>The Support/Help Worklet allows you to view external links for information and Workday educational materials.</td>
</tr>
<tr>
<td><img src="image7.png" alt="Directory Icon" /></td>
<td>The Directory Worklet provides access to co-workers contact information and multiple ways to view and search for workers within the organization.</td>
</tr>
</tbody>
</table>

Screen Functions

The functionality listed here are common throughout Workday.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image8.png" alt="Blue Text" /></td>
<td>Any blue text that becomes underlined when hovering over it is an actionable link to view object details.</td>
</tr>
<tr>
<td><img src="image9.png" alt="Related Actions" /></td>
<td>Related Actions allow you to view additional information and take action.</td>
</tr>
<tr>
<td><img src="image10.png" alt="Filter" /></td>
<td>Filter data based on any column.</td>
</tr>
<tr>
<td><img src="image11.png" alt="Graph/Chart" /></td>
<td>View the page information as a graph or chart.</td>
</tr>
<tr>
<td><img src="image12.png" alt="PDF" /></td>
<td>View the page information as a PDF file, allowing you to determine what information to include and print.</td>
</tr>
<tr>
<td><img src="image13.png" alt="Export" /></td>
<td>Export the page information as an Excel file.</td>
</tr>
<tr>
<td><img src="image14.png" alt="More" /></td>
<td>More at the bottom of a menu indicates there are additional selections available.</td>
</tr>
<tr>
<td><img src="image15.png" alt="Alerts" /></td>
<td>The yellow alert message warns you that the process has possible errors, but allows you to proceed.</td>
</tr>
<tr>
<td><img src="image16.png" alt="Error" /></td>
<td>The red error message is a hard stop. You will not be able to proceed to the next screen until the issue is resolved.</td>
</tr>
</tbody>
</table>
Tasks and Actions

These tasks and actions are available as you complete processes and change information in Workday.

<table>
<thead>
<tr>
<th>Link</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>⋆</td>
<td>Required field that needs information entered before submitting the page.</td>
</tr>
<tr>
<td></td>
<td>The Prompt icon displays a drop-down menu of available choices.</td>
</tr>
<tr>
<td></td>
<td>Use the Pencil icon to edit existing information.</td>
</tr>
<tr>
<td></td>
<td>Remove the item from the area.</td>
</tr>
<tr>
<td></td>
<td>Delete the current row.</td>
</tr>
<tr>
<td></td>
<td>Add a new row.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Click to cancel the changes entered.</td>
</tr>
<tr>
<td>Submit</td>
<td>Submit to confirm changes and move the item to the next step in the review process.</td>
</tr>
<tr>
<td>Save for Later</td>
<td>Save the change for later, but submit nothing. You can return to the task to complete at any time.</td>
</tr>
<tr>
<td>Approve</td>
<td>Approve the change and move the task on to the next step.</td>
</tr>
<tr>
<td>Deny</td>
<td>Deny any changes and return the task to the individual who initiated the change.</td>
</tr>
<tr>
<td>Send Back</td>
<td>Send back to have the task initiator review the information submitted.</td>
</tr>
<tr>
<td>Done</td>
<td>Exit the screen to close the view.</td>
</tr>
</tbody>
</table>

Employee Self-Service
Employee Self Service

Personal Information
- Contact Info
- Emergency and Urgent Contacts
- Photo
- Legal Name

Employee Profile
- Change Password

Time
- Time Off – View, Request, Correct
- Time Entry

Benefits
- Add Dependents
- Change Dependents
- Add Beneficiaries
- Change Beneficiary Information
- View Benefit Elections

Pay
- Payment Elections – Direct Deposit
- Changes
- Federal and State Withholding Elections
- View Payslips

Home Page

The upper right-hand corner provides access to your employee profile link, which includes a drop-down menu to navigate the system.

The upper left-hand corner provides access to the Search function and Home button.

The Workday, House and Home buttons will return you to your Home page from anywhere in the system.
Inbox, Actions & Archive

1. To access your **Inbox**, click your name in the upper right-hand corner of your Home page and then click **Inbox**. The orange circle next to the photo placeholder (Cloud) or your photo (if you have added one) indicates how many items are in the **Inbox**.

2. Click the down **arrow** next to **Viewing** and **Sort By** to control what type or how information appears in your Inbox.

Click the **Archive** tab. The right side of the screen will display details of the highlighted item in the left column.

Click the **Process** tab (right side of screen) to view the **Process History**, what has been completed and any remaining processes (and due dates).

Click **Remaining Process** to see what steps are upcoming for this action.
Notifications

1. Click your name in the upper right-hand corner of your Home page, then select Notifications. Note: The grey circle with a number indicates the number of unread notifications. Click the item to view.
2. Click the open circle on the right side of the task to mark as read.
3. Click the down arrow next to Sort By to control how your notifications will appear.
4. Click the down arrow on the right to mark all notifications as read or to refresh your Notifications box.

Note: Once the notification has been marked as read, it will remain in your notification box but will no longer be highlighted.

Personal Information

Use the Personal Information Worklet to access, change, and view your personal information in Workday.

Open the Personal Information Worklet to access:
- Contact Information
- Emergency and Urgent Contacts
- Photo
- Legal Name
Contact Information

1. Select Contact Information under the Change column.
2. Click Edit to change your Home or Work Contact Information.
3. Click the Pencil icon to edit existing information. Click Add to add new information.
4. After all information has been entered, click Submit and Done.

Emergency Contacts

1. Select Emergency Contacts under the Change column.
2. Click Add to enter your emergency contact.
3. Enter the Legal Name and Relationship.
   Note: Emergency contacts must have at least one primary phone number or email address.
4. Click Submit and Done.
Emergency Contacts

5. Click Edit to change a Primary Emergency Contact and/or add an Alternative Emergency Contact.
6. Select the Pencil icon to edit existing information.
7. Select Add button to add new information.
   Note: Add a Primary Address and a Primary Phone number.
8. When all required fields (*) have been entered, click Submit and Done.
   Note: Changes will be routed to an HR Partner for approval.

Photo

1. Select Photo under the Change column.
2. Click the Paperclip icon to upload a recent business appropriate headshot of yourself.
3. Click Submit and Done.
   Note: Photo Changes will be routed to your manager for approval.
Legal Name

1. Select **Legal Name** under the Change column.
2. Complete all required fields (*) then click the paperclip icon to attach documentation as proof of your legal name change.
3. Enter **Legal name Change** in the category field.
4. Click **Submit** and **Done**.

**Note:** Legal Name change will be forwarded to payroll for review.

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Employee Profile

1. Click your name located in the upper right corner of your Home page.
2. Click **View Profile** under employee name.
3. Click any of the tabs to view, add or change your profile information.
Change Password

1. Click your name in the upper right corner of the Home page.
2. Click My Account.
3. Select Change Password.
5. Click OK.

Time Off

The Time Off Worklet allows you to:

- Request time off
- View your balance(s)
- Correct your time off requests

Available Balances as of the current date are listed in the lower left corner of the screen.
**View Time Off**

1. Under the View column, click **Time Off Balance** to see all time off balances as of a particular date.
2. Enter the **As Of** date to view available balances for a specific date.
3. Click **OK**.
4. Click the **Printer** icon to print your time off balances or click the **Spreadsheet** icon to export to Excel.

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**Request Time Off**

1. Click **Time Off** under the Request column.
2. Click the calendar date to highlight the day(s) being requested. If you want multiple days off, click and drag the mouse over the days you are requesting. The days will be highlighted in **blue**.
3. Select the **Request Time Off** button to continue.
Request Time Off

4. Click on the Prompt Icon and select Type from the drop down menu.
5. Enter the total hours you are requesting per day in the Daily Quantity field, (e.g., 8 for the entire day). Unit of Time auto-populates based on the type of time off requested.
6. Click Submit.
7. Your time off request will appear on the calendar view. A grey check mark means the time off request is pending manager approval. A green check mark indicates the time off request has been approved.

Note: Employees will receive a notification in their Inbox of approval/denials, etc.

Correct Time Off

1. Under the View column, click Time Off Correction to see all time off requests.
2. Enter the correct time in the Correction to Requested field and enter a comment.
3. To delete a day, change the Correction to Requested hours to 0.
4. Click Submit after all time corrections have been made
5. Click Done.

Note: the time off correction will be forwarded to your manager for approval.
Note: Employees will receive a notification in their Inbox of approval/denials, etc.
Time Entry

Time is logged in many ways (i.e., physical time clock, Workday Clock In/Out, or Time Calendar).

Through physical time clocks, employees will finger-punch to clock in and out.

Hourly employees who do not use the physical time clock, will enter time using the Workday Time Worklet found on their Workday Home page.

For corrections, employees will need to submit a TARP (Time Adjustment Request Form) to their manager for approval.

Note: The HR/Payroll Representative will enter adjustments in Workday.

Benefits

The Benefits Worklet allows you to view your benefit plans and coverage. Workday will also display the date your coverage began, your dependents, and your beneficiaries.

- Add Dependents
- Change Dependents
- Add Beneficiaries
- Change Beneficiary Information
- View Benefit Elections

Salaried employees may choose to record their time in the Time Calendar for reporting purposes only. Time Off requests for full days off can be requested through the Time Off Worklet.
Add/Enroll Dependents to Benefit Plan

1. Click Benefits under the Change column.
2. Click the down arrow to select the Benefit Event Type (i.e., Birth/Adoption).
3. Enter the Benefit Event Date, attach any relevant documents.
4. Click Submit.

Note: Benefit Changes will be forwarded to the Benefits Administrator for approval.

5. Click Open to enroll your dependent.
6. There are multiple steps in adding dependents to your benefit plans. You must enroll your dependent before you can add them to your benefit plans; new dependents will not visible in the Existing Dependents list until you complete this step. Click the Prompt icon next to the plan, then click Add My Dependent from Enrollment.
7. Click Yes or No to use your new dependent as a beneficiary, then click OK to advance to the next screen.
Add/Enroll Dependents to Benefit Plan

8. To add a dependent, enter First and Last Name and all other required fields (*).
9. Enter the dependent’s Social Security Number by clicking Add.

10. Enter the Address.
11. Click OK.
Add/Enroll Dependents to Benefit Plan

12. There are multiple steps in the benefit election process. The number of steps may vary depending on the life event chosen and is shown at the top of each screen.

13. Click the Continue button at the bottom of each page to advance through the screens.

14. Click I Agree to provide your Electronic Signature.

15. Click Submit to continue the enrollment process.

16. Click Print for a paper copy of your Benefit Elections

17. Click Done.

Note: Be sure to review all selections thoroughly prior to clicking submit as all elections are considered finalized.

Benefit Changes will be forwarded to the Benefits Administrator for approval.

Change Dependents

1. Click Dependents under the Change column.

2. Click Edit to change your dependent(s).

3. Click the Pencil icons to open fields for editing. Make all changes.

4. Click Submit and Done.
Add Beneficiaries

1. Click Beneficiaries under the Change column.
2. Click Add to enter a new beneficiary.
3. Choose the appropriate option to identify the new beneficiary.
4. Click OK.

Note: If you want to assign an emergency contact as a beneficiary, use the Prompt icon to add that person on this screen.

Adding a beneficiary will not automatically assign them to a benefit plan. You must navigate to Add Dependents to assign beneficiaries to a benefit plan.

Add Beneficiaries

5. Click the Pencil icon next to Legal Name to open the screen to enter the name and Relationship.
6. Enter any additional information available.
7. Click Add under Primary Address (located under the Contact Information section) to enter your beneficiary's address. Complete all required fields (*).
   Note: Beneficiaries or dependents must have at least one address.

5. Click Submit and then Done.
View Benefit Elections

1. Click Benefit Elections from the View column.

Note: Current Cost displays the semi-monthly payroll deduction for elected benefits. Amounts vary based upon your benefit elections. Note: If you are on a weekly or bi-weekly payroll schedule, your deductions per paycheck may look different.

View Benefit Elections

You have the ability to view your benefits plan and coverage. Workday will also display the date your coverage began, your dependents, and your beneficiaries.

Note: You can view your Benefits Elections report, print it, or export it to Excel.
Pay

The Pay Worklet will allow you update your Withholding and Payment Elections as well as view your Payslips.

- Payment Elections – Direct Deposit Changes
- Federal and State Withholding Elections
- View Payslips

Payment Elections – Direct Deposit Changes

1. Click Payment Elections under the Actions column.
2. You can Change Account to make changes to current accounts, Delete Account to remove an account you will not use again or Add Account to set up additional accounts.
Payment Elections – Direct Deposit Changes

3. Add account information for use when electing direct deposit for payments.

4. Assign the account a nickname for easy identification later.

5. Choose the Account Type.

Note: Each field is required and drives the direct deposit transaction.

6. Enter the Bank Name, Routing Number and Account Number.

7. Click OK.

8. Click Change Election under the Payment Elections section to designate how to receive payments.

9. Using the Prompt icon, select the Country (United States of America), Currency (USD), Payment Type (Check or Direct Deposit), Account and Balance/Amount/Percent.

10. Click OK and Done.

Note: If multiple payment elections are chosen, designate the Order and distribution of payments. Choosing Balance for the last account will ensure that, no matter what changes occur in your paycheck, money will always be distributed 100%.
Federal Withholding Elections

1. Click Withholding Elections under the Actions column.
2. Click Update to maintain your federal withholding information.

**Note:** You are required to update each tab one at a time. Depending on your location, you may or may not have Local Elections or Tax Allocations.

3. Verify the Company and Effective Date.
4. Click OK to open the form.

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Federal Withholding Elections

5. Update your Marital Status, the Number of Allowances and/or any Additional Amounts. Click the Exempt box to claim exemption from withholding if applicable.
6. Read the Legal Notice and click the I Agree box.
7. Click OK.
State Withholding Elections

1. Under the State Elections tab, click Update to maintain your state withholding information.

Note: You are required to update each tab one at a time. Depending on your location, you may or may not have Local Elections or Tax Allocations.

2. Verify the Company, Effective Date and State.
3. Click OK to open the form.

4. Using the Prompt icon, enter the Withholding Allowance and Number of Allowances.
5. Read the Legal Notice and then click I Agree.
6. Click OK.
View Payslips

1. Click **Payslips** under the View column to display all information pertaining to a specific pay period and YTD totals.
   **Note:** The first page of Payslips provides a high level summary of your pay.

2. Click to **View details** or **Print** from this page. **Print** creates a PDF of your Payslip.

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**General Information**

**COMMON WORKDAY ACTIVITIES BY ROLE**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Employee</th>
<th>Manager/Supervisor</th>
<th>HR/Payroll Representative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Personal Information</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Request Time Off</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manage Dependents and Beneficiaries</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Pay Slips</td>
<td>✔</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Manage Payment Elections</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manage Federal and State Withholding Elections</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enroll in Time Clock</td>
<td></td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>View Team Birthdays &amp; Work Anniversaries</td>
<td>✔</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Perform Approvals</td>
<td>✔</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Enter Employee Job Changes</td>
<td>✔</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Enter Compensation Changes &amp; One Time Payments</td>
<td>✔</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Run Reports</td>
<td>✔</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Create Job Profile</td>
<td></td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Hire/Move Employee</td>
<td></td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Assign Pay Group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time Corrections/Adjustments</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Place/Retain Employee from Leave</td>
<td></td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>Terminate an Employee</td>
<td></td>
<td></td>
<td>✔</td>
</tr>
</tbody>
</table>
MOBILE FUNCTIONALITY

Workday Mobile

Loading the App and Signing on

Easy Sign On

Time Off – View, Request, Correct

Benefits
  - Add Dependents
  - Change Dependents
  - Add Beneficiaries
  - Change Beneficiary Information
  - View Benefit Elections

Pay
  - Payment Elections – Direct Deposit
  - Changes
  - Federal and State Withholding Elections
  - View Payslips
Workday Mobile

You can use your mobile device to complete and/or approve tasks, view reports and view employee information.

• Load the app on your device
• Enter your Tenant Name: Ensign
• Enter your Ensign User Name (Employee ID) and Password
• Click Sign In

Mobile PIN Sign-on

You can sign into your Workday Mobile app using a simple PIN (between 6 and 8 digits) instead of keying lengthy username and password combinations every time. Once you have created your Workday PIN, you will enter that PIN and click the checkmark to access Workday Mobile.

To Set Up/Change PIN
• Click the menu/gear button
• Scroll down and click Settings
• Click Set/Change PIN

If you are unsuccessful at entering your PIN after 3 attempts, you must sign in with your Workday username and password.
Workday Mobile App Notifications

To receive a notification on your mobile app
• Click the gear icon
• Select the General option
• Select the Notifications option
• Slide Notifications to on

Mobile Worklets & Dashboard
• Click into each Worklet to view the available information.
• See the sample Dashboard for viewing reports.
Support / Help

- Visit www.WorkdayatEnsign.com
- Workday Educational Materials Available:
  - User Guides
  - Quick Reference Guides
  - Demo Videos
  - eLearning Module

THANK YOU