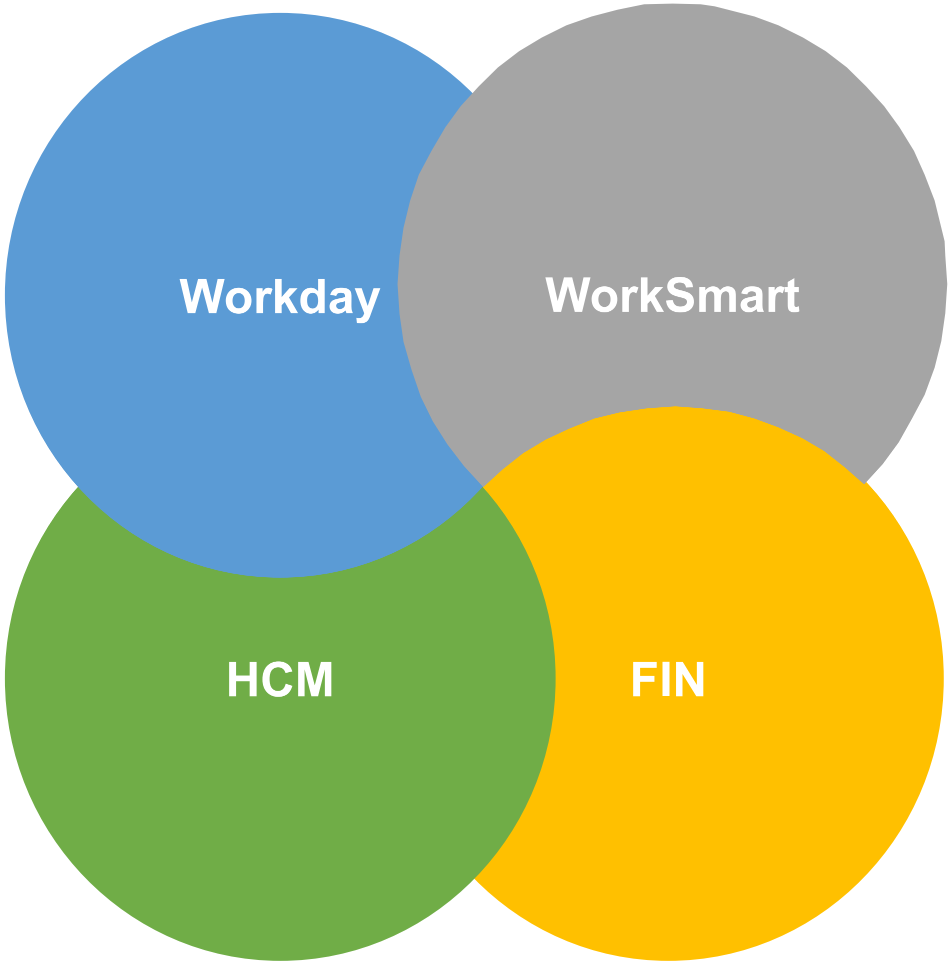
IOWA WORKSMART
EMPLOYEE SELF-SERVICE

What are WorkSmart and Workday?

The Iowa **WorkSmart** Project is the implementation of **Workday**, a single, unified, state-of-the-art cloud-based system used for HR, Payroll, and Finance business processes.



Workday HCM replaces the Human Resources Information System (HRIS) in Phase 1 and **Workday FIN** replaces Integrated Information for Iowa (I/3) in Phase 2 of the **WorkSmart** Project.

Benefits of Workday

User Friendly Navigation

One Portal

Mobile Functionality

Up-to-Date

- Designed like a consumer website, Workday is user friendly.
- By utilizing cloud-based technology, Workday provides information from one portal.
- Workday is easily available from anywhere, on any device which has an Internet connection.
- Workday provides semi-annual releases to ensure the latest software enhancements and functionality are available.

HCM Scope

What's In Scope?

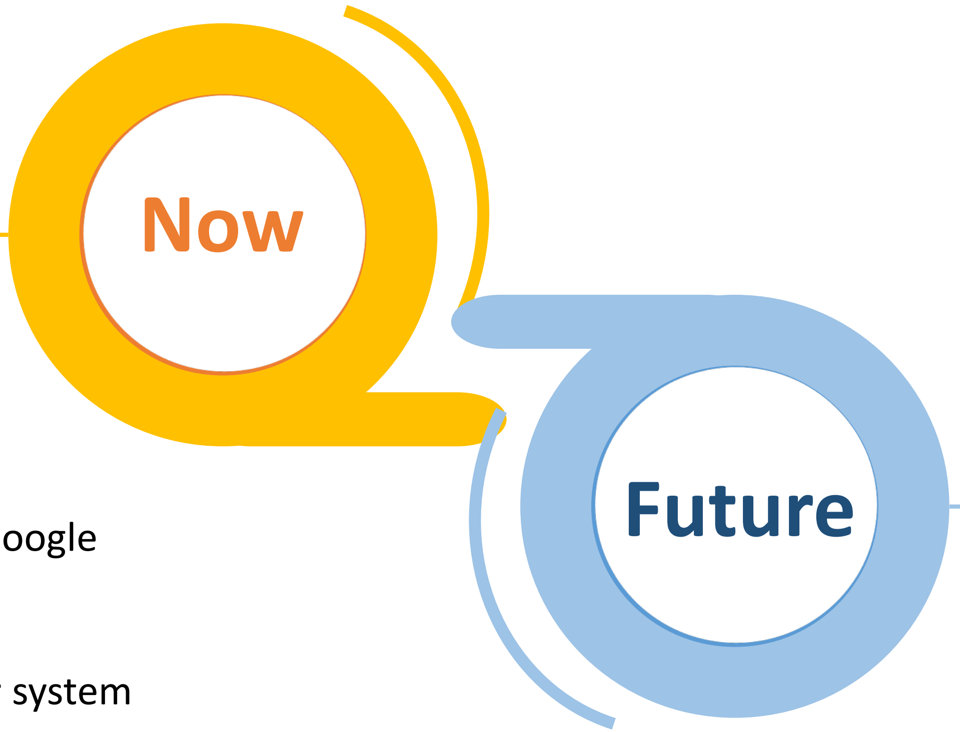
In Scope

- HCM Core
- Travel Expense Reimbursement
- Time Tracking
- Absence Management
- Payroll
- Compensation
- Benefits
- Onboarding

Not in Scope

- Recruiting (NeoGov)
- Learning (LearnSoft)
- Performance

Current Versus Future State



Today I Need To…

- Hire someone in HRIS
- View State Contact information in Google Contacts or SOI website
- Request vacation in eLeave or other system
- View paychecks in online payroll warrant website
- Submit travel expenses in I3

Future State - Fundamentals

Workday Fundamentals

Impacted Groups
- Managers
- Employees
- HRAs

Summary of Change: Statewide transition to Workday brings changes to terminology and some business processes along with new functionality.

What's Changing?	Current State	Future State
Legacy systems to Workday	HRIS is used for HR functions and I/3 is used for Finance and Accounting functions.	Workday will be implemented in a phased approach. Phase 1: Workday HCM will replace HRIS and IowaBenefits. Phase 2: Workday Financial Management (FIN) will replace I/3.
Supervisory Organizations	Currently referred to as Span of Control, organizational charts are often outdated and are not visible to employees in HRIS.	In Workday, Supervisory Organizations (Sup Orgs) are used to group employees into a management hierarchy that provides structure for employee reporting relationships and transactions. Sup Orgs are visible to all users through a clear visual that shows team members and open positions.
Foundational Data Model	The current Chart of Accounts, or list of financial accounts available for recording transactions in the general ledger, is in I/3.	The Foundational Data Model, or FDM, is the multidimensional structure used across HCM and Financials to tag and report on transactions. Our Transitional FDM for Phase 1 is a subset of the I/3 Chart of Accounts mapped to Workday dimensions.
Business Processes (BPs)	Non-standard, often manual, paper-based processes exist.	Sets of tasks, such as initiating or approving a step, must be completed in Workday in a certain order in the system for an event to occur. Tasks associated with Business Processes are routed to users for completion based on their security. Examples of BPs include Onboarding Setup, Enter Time, Request Time Off.

What is the Benefit? Ease of use, real-time data access, standardized processes, accessibility, cloud-based.

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Ease of Use	Legacy systems lack the modern navigation tools that users appreciate in web-based systems.	Workday includes features and functionality not seen in the legacy systems, such as a customizable homepage where announcements are posted and applications are easily accessed, a robust search engine, an Inbox for receiving secure messages, and a quick view to Notifications.
Accessibility	HRIS does not incorporate accessibility features.	Workday is committed to designing products that all users can access. Users do not require special configuration to enable their assistive technology to interact with Workday.
Delegation	HRIS does not offer ability to delegate tasks to a peer.	Users will have the ability to temporarily reassign select tasks to another user who will be able to perform individual actions on behalf of the delegator for a specified period of no longer than one year. The Delegate should be a person (peer or supervisor) who already has access to the same information you do. All requests for Delegation will go through an approval process.
Reporting	Reports must be compiled from one or more systems.	Workday has many standard delivered reports and offers the ability for an organization to create custom reports. Access to reports is controlled by security roles. A crosswalk is being built to map key current state to future state reports.

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Future State - Employees

Employee Self-Service (ESS)

ESS enables employees to view and update their personal information and easily initiate requests.

Employee Self-Service (ESS)

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What's Changing?	Current State	Future State
Onboarding	Newly hired employees fill out manual forms sent from several different people.	When a new employee is hired into Workday, onboarding tasks are initiated for the employee prompting them to enter personal information, set up payment elections, elect benefits, and other onboarding tasks as determined by the agency or the Manager. This may also apply to employees who change jobs.
Employee Personal Information	Paper forms or other manual processes	Employees will initiate changes to personal information directly in Workday, including: Home Address, Emergency Contacts, Title, Legal Name, Preferred Name, Profile Photo. Note: HRAs will be able to edit additional employee data that employees can't edit, such as Next Increase Date and passport or visa information.
Personal email addresses	Personal email addresses are not stored in HRIS, but there are personal email addresses in IowaBenefits for some employees.	Personal email addresses in IowaBenefits will be converted to Workday and employees will enter and maintain personal email address in Workday moving forward.
Disability Status and Veteran Status	Veteran status is currently tracked in HRIS. Disability status is not tracked in HRIS unless an employee has requested and been approved for a reasonable accommodation.	Employees will be able to self identify as a Veteran in Workday (voluntary task at Onboarding). HRAs will still update Disability status in Workday if an employee has requested and been approved for a reasonable accommodation.

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Payment Elections	Current process allows one account plus select credit union deductions and has an approval chain to catch errors.	Employees will change or update payment elections in Workday, electing up to 4 different banks or credit unions. When entering or changing a bank account, employees will attach supporting documents in Workday. Workday will validate the routing number. Any changes made by the employee to their bank account will require HRA approval.
Tax Withholding Elections	Employees currently fill out a form for Federal, State, and Local withholding and give it to their HRA.	Tax withholding forms will be completed within Workday. HRA approval is only needed if the employee is claiming exempt.
Electronic W-2	W-2s are either mailed directly to employees or given to departments to share.	Employees may elect whether they want a paper or electronic W2. Workday defaults to paper W-2 sent via mail, but employees can change this and view and download their W-2 electronically.
Pay slips	Employees view pay slips in online warrant system. https://www.egov.state.ia.us/warrants/warrantProcessorServlet	Pay slips for pay periods ending after the Workday Go-Live date will be accessible within Workday. Pay slips will look a bit different than they do currently. The Payroll team is putting together a crosswalk to assist employees with adjusting to the new format.

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Benefits Election	Benefits are elected in IowaBenefits during open enrollment and for changes due to a life event.	Timing and communications around Open Enrollment will not change, but employees will elect benefits in Workday. Requirements for benefit changes due to a life event also remain the same, but employees will submit requests, make elections and upload documentation in Workday.
Change Beneficiary	Employees add or change beneficiaries in IowaBenefits.	Employees will add or change beneficiaries in Workday.
Add/Change Dependent	Employees add or change dependents in IowaBenefits. There is no trigger to add/change dependents when benefits change due to a life event.	Employees will initiate changes to dependents within Workday. Employees who make a change in benefits as a result of a life event such as birth or adoption will be prompted to add the dependent as part of the task.
Deferred Compensation	Currently known as the Retirement Investment Club (RIC), employees select a vendor, fill out a form, and meet with the vendor to establish the account.	Deferred compensation will be elected directly in Workday. Employees will initiate the process and will elect to contribute a percent or flat rate. No approvals are needed. Employees will be able to see all benefit deductions in one place.

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Spend Authorizations	Travel Department Authorization (TDA) used for pre-authorization.	Spend Authorizations will be done in Workday. Note that Spend Authorizations are only for out-of-state/international travel so this doesn't impact most employees.
Travel Expenses	Travel Payment (TP) document is used for submitting expenses for reimbursement, including travel expenses.	Expense reports for reimbursement of travel expenses will be entered and approved in Workday. Employees can initiate the request, or a member of the financial team can initiate it for them. Receipts are still required per policy. Non-travel expenses will continue to be processed through a TP form until Phase 2.
Mobile Functionality for Expenses	There is currently no mobile functionality for submitting expenses	Workday provides functionality for employees to view, edit, and submit Spend Authorizations and Expense Reports via mobile devices. Photos of receipts can be captured and uploaded to Workday.
Travel Cards	Travel card expenses are manually entered and submitted on a TP document.	After go-live, Travel card expenses will be automatically loaded into Workday, reducing the amount of manual input by employees.

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Work Schedules	There is a default timesheet in HRIS that shows the number of hours but not the start and end times. If an employee has access to their work schedule in HRIS, they can change it anytime they want.	Employees may select/request a pre-configured work schedule from a list. The request will route to their Manager for approval. Schedules are used in Workday's validation of time off and time tracking, so having an accurate total hours for each day is essential. The work schedule drives many things downstream such as holiday/ comp/overtime pay, ability to request time off, and payroll for exempt employees .
Time Entry – most agencies	In HRIS, time worked and time off are both entered directly on the timesheet.	In Workday, separate processes are used for entering time worked and time off. Non-exempt employees will enter and submit time worked through the Time Entry Calendar. Exempt employees are not required to enter time unless certain conditions are met. Workday routes submitted time for approval. Note that the Time Entry Calendar does display time off and holidays but is not used to request time off.
Time Entry - exceptions	Some agencies use Kronos, Unanet, TARs, TRACS, or LPS to enter time worked.	Some agencies will continue to use external time tracking systems that will integrate with Workday. Time entered outside of Workday will be uploaded to Workday time tracking via an integration each pay period. Workday will be the system of record regardless of whether time is directly entered or sent through an integration.
Time Corrections	If a timesheet processes with incorrect hours in HRIS, there is no way to correct the timesheet. Instead, HRAs have to do manual adjustments to correct the employee's pay and/or time off.	Employees will navigate to their previous submission in the Time Entry Calendar and correct their time in the same manner in which they entered it. Managers will need to approve the correction.

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Work Reporting Codes	Some agencies track time to projects using functionality in HRIS.	As part of time entry, some agencies will have the ability to track activity in Workday using custom worktags called Work Reporting Codes. This is a temporary solution as Phase 2 of WorkSmart will bring Project Management functionality to all agencies.
Terminology – Time Off	All time away is commonly referred to as time off.	Workday makes distinctions between Time Off and Leave of Absence (LOA). For Time Off, expected return date is typically known up front and the employee remains an 'active' worker. Examples include vacation, sick, jury duty, banked holidays. For LOA, return date may be estimated and employee status is changed to "On Leave". Examples include FMLA, Medical, Workers' Compensation, Military Leave.
Absence Calendar	Employees request time off through email, in person, or via an external system, and then reflect that time off was used when completing their timesheet. There is generally no comprehensive view of upcoming time off for individuals or teams.	Employees will access the Workday Absence Calendar to view, enter, edit, submit, and correct their time off. They will also be able to see when team members are off but will not be able to see the reason for the colleague's absence.
FMLA	FMLA is out-sourced to an FMLA Administrator.	Employees will have the ability to request a Leave of Absence in Workday. When the employee is ready to return, their manager will complete a request in Workday to return the employee to work.

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Leave Retention Request	During FMLA, employees can elect to retain some vacation hours A paper form is received from an HRA, completed, and returned to the HRA.	Leave Retention will be managed within Workday as part of the Request Leave of Absence business process. When the employee is put on an applicable leave, they will receive an Inbox item about Leave Retention.
Sick Conversion	A flag (checkbox) is on the timesheet in HRIS to elect conversion of sick time to vacation time. The employee can select the checkbox and leave it selected for future pay periods. A warning will display if they don't have enough time to convert.	Employees will elect to convert sick time to vacation time in Workday by turning on a Sick Conversion flag in their worker record. The employee will enter an effective date and the flag will remain on until the employee or HRA turns it off. When the flag is on, Workday will automatically process the conversion in any conversion pay period in which the employee is eligible to convert.
Vacation Conversion - SPOC	SPOC employees may convert vacation to sick leave once per fiscal year and upon retirement. The employee completes a paper form that is sent to the HRA, who then enters the conversion in HRIS.	Vacation conversion will be requested from the Absence Calendar and the employee can only convert once per fiscal year unless they also retire in the year that the conversion was made.
Annual Vacation Buyout	The HRA currently enters the request in HRIS after receiving a form from the employee with hours requested. The HRA checks the vacation balance, and inputs in the system if valid.	Employees will be able to make their vacation payout election in Workday if their agency is participating in the payout. The system will check the employee's vacation balance to ensure it is at least 160 hours and HRA approval will not be required.

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Changing overtime to comp time	Currently, employees and/or HRAs can change overtime hours to comp earned by changing the time type on the timesheet. For employees whose time is loaded via integration or entered in PAYN, the comp time election is communicated via email or in Kronos and the HRA enters the comp time hours.	Overtime will be calculated in Workday even when time worked is submitted through an integration. Employees will have access to enter comp earned for any overtime hours.
Accrual balances	Employees have limited ability to see their accrued hours.	Time off accruals will be calculated and displayed in Workday. Workday employee self service allows employees to view personal information at will. Note that Workday shows the current period accrual added to an employee's balance as of the period end date and Workday will not let an employee use it until the next day. There is no change in the accrual policy, but the display is different.
Catastrophic Leave Donations	Catastrophic leaves donations are currently done using paper forms and employees can only donate vacation hours.	Employees will be able to create a request in Workday to donate vacation hours to an employee who is eligible to receive donations. The donated leave process will be handled by the Leave Manager who will use the donor's hours and apply them to the recipient as they are needed and in accordance with DAS-HRE rules.
Access to data after termination	Employees do not have access to HRIS once employment ends.	Terminated employees will have self-service access in Workday for one year from their last date of employment. This will be useful for retrieving pay warrants and W-2s and viewing the COBRA notice and information about their service.

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Total Rewards	Employees have insight into the cost incurred by the State for benefits through the Iowa Online Payroll Warrant report.	Workday provides the employee with an understanding of the total value of their compensation package, including base and variable pay, medical plans, life insurance, and other benefits visually through a pie chart graph.
OneGift Pledge	Once a year campaign, employees can set up one-time payment or recurring.	Employees will be able to make OneGift elections in Workday during the annual campaign. Any changes made after that date will need to be completed by the HRA.

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Questions?

For questions, please contact your organization's Change Agent

or

Visit the website at: WorkSmart.iowa.gov

To locate your Change Agent, please go to the Change Agent Directory.