

Facilitator Guide

Course Title	Workday In-Person Training Series – Week 2
Delivery Method	
Duration	2 hours
Course Description	
Course Objectives	
Course Agenda	
Primary Audience	
Recommended Pre-Requisites	
Supplemental Material	

#	Slide Title	Facilitator Notes
Introduction		
Timing for the Section:		
1		
2	Workday In-Person Training Series	<p>Welcome to the Workday In-Person Training Series. My name is [name] and I'll be facilitating today's training. I work at [your unit] as a [your job title].</p> <p>With us here today to help are [introduce helpers]. [Allow helpers to introduce themselves – their names, where they work, etc].</p> <p>If you haven't yet signed in, we will bring the sign-in sheet to you, so you can raise your hand.</p>
3	What to Expect	<p>So, let's talk about what you can expect to do during our time together.</p> <p>We will...</p> <ul style="list-style-type: none"> • review how to complete tasks in Workday • give you time to practice completing tasks • You'll see the computers in front of you, and we will walk through using those here in a little bit. <p>Some things we will not be able to do today...</p>

		<ul style="list-style-type: none"> • answer personal employee questions <ul style="list-style-type: none"> ○ If you do have questions about your job or any personal details, we cannot answer those today. We would encourage you to talk to your supervisor or your local HR staff to help you with those personal questions. • address department-specific policies or procedures <ul style="list-style-type: none"> ○ We know that different departments and units have different policies and procedures, so if you have a question about how something will work in your own department, you should talk to your supervisor.
4	Learning Objectives	<p>For today's session, here are our learning objectives. By the end of today's session, you will know how to:</p> <ul style="list-style-type: none"> • Review your benefits elections • Update retirement accounts • Update W4 • Update direct deposit • Update personal information
5	Agreements for Today	<p>As we present information today and allow you time to practice, we have some working agreements that we ask that you follow, so let's look at those.</p> <p>Stay engaged – Listen during the presentation and use the work time to practice and explore.</p> <ul style="list-style-type: none"> • This will help you understand what to do during the practice time, so make sure you are listening and following along. <p>Ask questions – Raise your hand if you have a question or need help during the work time.</p> <p>Don't get too far ahead – Stay with the rest of the group so you don't get lost.</p> <ul style="list-style-type: none"> • Try not to get off task because it may be difficult for you to get caught back up.

		<p>We are working in a group space –You are welcome to ask your peers for assistance if you are comfortable, or you can raise your hand if you want a helper to come around and assist you.</p> <p>If you think you can agree to these, give us a thumbs up.</p>
6	<p>Engagement Activity - Partner Discussion</p> <p>Timing: 10 minutes</p> <ul style="list-style-type: none"> • 2 minutes for instructions • 5 minutes for participants to discuss • 3 minutes for whole group discussion 	<p>Before we get into this week’s information, let’s review the information that we talked about last week.</p> <p>Please introduce yourself to the person next to you, including your name and where you work. Then, identify if the four statements are true or false based on the information from last week. Discuss the statements with your partner, and we will talk about them in a few minutes.</p> <ol style="list-style-type: none"> 1. You can only log into Workday using a computer. 2. You need your personal NetID and Password to log into Workday. 3. To return to the homepage from anywhere in Workday, all you need to do is click Wisconsin logo. 4. To change your personal information, like your phone number, you will have to contact your supervisor. <p>*Note to Facilitator: – Give the participants about 5 minutes to chat. When they are done, ask for a few volunteers to share their answers and discuss the correct answers, sharing some more details. See the answers below.</p> <p>Answers and talking points:</p> <ol style="list-style-type: none"> 1. False – You can use a computer or your phone to access Workday 2. True – You will need to enter your NetID and Password when logging into Workday. 3. True – The Wisconsin logo in the upper left corner will bring you back to the homepage, no matter where in the system you are. 4. False – You can update your personal information yourself. However, if you have a change in name or address due to a marriage, divorce, or other life event, you should contact your local HR as these changes may impact your benefits.

Recap of Week 1

Timing for Section:

7	Recap of Week 1	Let's get into a bit deeper of a recap from last week.
8	<p>Engagement Activity - Partner Discussion - Review of Workday</p> <p>Timing: 10 minutes</p> <ul style="list-style-type: none">• 2 minutes for instructions• 5-7 minutes for discussion• 3 minutes for full group share out/discussion/present information on the slides	<p>*Facilitator Note: Slide uses an animation to reveal the bulleted lists.</p> <p>Last time we shared some advantages of using Workday, and an overview of things you can do in Workday. Take 5 minutes to chat with a person or people near you about some advantages of the system and some of the actions you can do in Workday. After, we will share out some of our ideas.</p> <p>*Give 5-7 minutes for participants to discuss.</p> <p>*Ask for volunteers to share out the advantages first, then the things you can do in Workday. After you have a few people share, click to reveal the lists.</p> <p>Advantages of Workday:</p> <ul style="list-style-type: none">• Having access to the system using the mobile app• The search bar to help you find what you need• Make quick changes to your personal information <p>Things you can do in Workday:</p> <ul style="list-style-type: none">• Submit time off• Update contact information, direct deposit, federal and state tax elections• View and print pay slips• View benefits information
9	<p>Logging into Workday</p> <p>Timing: 10 minutes</p> <ul style="list-style-type: none">• Review instructions• Give group time to get logged in	<p>We are going to give you time to log into Workday on the computer if you are choosing to use one. The instructions to log into Workday on the computer are on the screen. If you want to use your phone to log into Workday, you can find the app that you downloaded last week. The icon for the app is on the screen.</p> <ol style="list-style-type: none">1. Open Google Chrome (internet browser) on the computer

		<ol style="list-style-type: none"> 2. Visit MyUW (my.wisc.edu) 3. Enter your NetID and Password 4. Duo Authenticate using the Verification Code or Due Mobile passcode 5. Once logged into MyUW, find the Workday app and click Launch full app
Benefits and Pay Hub		
Timing for Section		
10	Overview of the Benefits and Pay Hub	<p>Today one of our main focuses is the Benefits and Pay Hub. This space in Workday is a single location where you can view your benefits, pay, and compensation information.</p> <p>Nothing about your benefits or pay are changing. You will still be receiving your pay and benefits as you do today. But if you want to review your payslips and benefit elections, you will be using Workday to do so.</p>
11	What is the Benefits and Pay Hub?	<p>In the Benefits and Pay Hub, you can:</p> <ul style="list-style-type: none"> • Review your benefit elections, such as your health insurance or other insurance plans you're enrolled in. • Find your tax documents • Update information for federal and state withholding elections • And view and print your payslips
12	Benefits and Pay Hub	<p>To get to the benefits and pay hub,</p> <ol style="list-style-type: none"> 1. you can start from the Workday home page and click the Menu button 2. Then click the Benefits and Pay app to open.

13	Benefits and Pay Hub (Mobile app)	<p>To do this from the mobile app,</p> <ol style="list-style-type: none"> 1. Tap the Apps button on the bottom bar 2. Then Tap the Benefits and Pay app to open it.
14	Overview of the Benefits and Pay Hub	<p>The Benefits and Pay Hub is your go to spot if you want to view or update anything related to your benefits and pay. On the left side of the screen, there is an expandable task bar that will show you all of the things you can view in this hub. Each of these items expands and allows you to view and do different things, which we will review in this section of the training, but here is a brief overview:</p> <ul style="list-style-type: none"> • Overview – This is what the Benefits and Pay hub will automatically open to each time. • Benefits – You can view your benefit elections, like your health or dental insurance. You can also make updates to your supplemental retirement • Pay – Here you can view your payslips and tax information • Compensation – This is where you can see details about your yearly income based on your employee contract • Suggested Links – This final spot expands to give you some additional resources related to your benefits and pay, most of which connect to information from the Universities of Wisconsin. <p>Next we will look a little bit more in detail about each of those areas.</p>
15	Benefits and Pay Hub (Mobile app)	<p>To access the tabs in the mobile app version, tap on Benefits and Pay Hub at the top of the screen. This will open a dropdown list of the other areas of the hub.</p>
16	Overview page	<p>The first page that will open up is an Overview page. This page includes an overview of your pay, including most recent pay, deduction amounts, current</p>

		benefit costs, withholding elections, payment elections or direct deposit, a link to change benefits, and a link to view your tax documents.
17	How to view benefits elections	<p>In the Benefits tab, there are three areas that you can review: Benefit Elections, Benefits by Date, and Affordable Care Act (ACA) Forms. We will be looking at the benefit elections page.</p> <p>The benefits elections page shares an overview of your current benefits elections and their semimonthly cost (which means twice per month). This is where you will see all the various types of benefits you are enrolled in such as health, dental, life and also the supplemental retirement accounts.</p>
18	Benefits tab	In Workday, you can make updates to your Supplemental Retirement Plan 403(b) and WRS Voluntary Additional Contributions. All other benefit enrollments (health, dental, etc.) will be through the My Insurance Benefits system, which is linked on the Change Benefits page on the right. More information on registering for and using My Insurance Benefits is coming soon.
19	How to update supplemental retirement	If you do want to make updates to your supplemental retirement elections, either your 403b or 457b elections, you can click Change Benefits button, and it will open the Change Benefits screen which we just saw. But remember, you can only make changes to your Supplemental Retirement in Workday. All other updates will be made in the State of Wisconsin Employee Trust Funds (ETF) system called My Insurance Benefits. All university employees are also state of Wisconsin employees. As such, our benefits (such as health insurance, dental and Wisconsin Retirement System) are administered by the Employee Trust Funds.
20	New Benefits Tile in MyUW	You can access the My Insurance Benefits system from the Benefits and Pay hub, or you can easily access it through the new tile in MyUW.
21	What can I do in Workday vs. ETF?	Just for your awareness, here is an overview of what you will use Workday for, and what you will use My Insurance Benefits for in terms of benefits. Again, nothing

		<p>about your benefits or eligibility will change. The only thing that is changing is where you review it and where you make changes.</p> <p>In Workday, you can:</p> <ul style="list-style-type: none"> • View benefits elections • View benefits costs • Review, Elect, or Update: <ul style="list-style-type: none"> • Supplemental retirement plan (403b) • Wisconsin Retirement System (WRS) Additional Contributions <p>In My Insurance Benefits from ETF, you can:</p> <ul style="list-style-type: none"> • View benefits elections • View benefits costs • Update most benefits during: <ul style="list-style-type: none"> • Qualifying life event (marriage, birth, divorce) • Yearly open enrollment • Update dependent information • View WRS Statement of Benefits
22	What should I do now?	<p>So you may be thinking what do you need to do now. The answer is nothing. You do not need to go into the system to make any updates or make any benefits elections. More communication will be coming soon about the yearly open enrollment.</p> <p>If you do experience a qualifying life event, such as a marriage or a birth of a child and need to update or change your benefits, contact your local HR and they can help you.</p>

23	View payslips and pay history	Next we're going to look at the Pay part of the Benefits and Pay Hub. Under Pay under the lefthand options, you can select to review Payments, or Tax information. We're going to start with the Payments page.
24	Overview of payments page	<p>In the Payments page, you can view and print your payslips, your most recent pay, deductions, and pay history. In the Most Recent Pay box, you can also see your next pay date, along with the expected take home pay. In the Deductions box, you can see the total about of taxes and deductions from your most recent payslip, along with a breakdown of each type of deduction and for how much.</p> <p>In our next section, we will look more closely at how you can view and print your payslips.</p>
25	View and update tax forms	Now we're going to look at the Tax part of the Pay tab. To open this, click the Pay tab on the left side, then Tax from the dropdown.
26	Overview of tax page	Here, you can review and update information for your W4 tax withholdings. You will also be able to see your tax forms from June 29, 2025 and beyond.
27	Tax and earning statements	<p>If you're trying to see your tax statements from before June 29, 2025, you will need to go to the Historical Payroll and Benefits tile in MyUW, as that information will not transfer to Workday. This tile also includes historical Wisconsin System Retirement Statement of Benefits.</p> <p>The Statement of Benefits is a summary of your WRS retirement account available each year in mid-April. It helps you keep information up to date and track the</p>

		growth of your retirement account for those who are eligible. Your benefits confirmation includes previous benefits you selected during open enrollment.
28	How to Update W4	To update that information, you can follow these steps: 1. Click Federal Withholding Elections or State/Local Withholding Elections on the Worker Tax Information page. 2. Update your information. Click the I Agree checkbox before submitting. 3. Click OK to submit.
29	Update W4 confirmation	4. To confirm you have submitted properly, you will a popup window will show "You have submitted"
30	Compensation tab	The final tab we have to look at is the Compensation tab. There are three areas under that tab: Total Rewards, Compensation history, and Compensation summary. Total rewards shows the total value of your annual income. Compensation history shares changes to your compensation, including effective dates. Compensation summary shares an overview of your current compensation amount.
31	Engagement Activity - Practice: Explore the Benefits and Pay Hub Timing: 15 minutes	To help you explore Workday's Benefits and Pay Hub, complete the tasks on the screen. You do not necessarily need to take action on any of these items, but we wanted to give you some specific things to look through to help you explore. 1. Look at the Overview Page

	<ul style="list-style-type: none"> • 3-5 minutes for instructions • 10 minutes for learners to practice and explore 	<ol style="list-style-type: none"> a. Identify your most recent Take Home Pay (you may have to click to unhide the information) 2. Review the Benefit Elections <ol style="list-style-type: none"> a. Identify what Health Care and Accounts you have. 3. Review the Benefit Elections <ol style="list-style-type: none"> a. Identify the “My Cost” and the “Employer Cost” 4. Review the Compensation tabs <ol style="list-style-type: none"> a. Look at your Total Rewards and Compensation Summary
32	Break Time	Give a 10-minute break
How to View and Print your Payslip Timing for Section:		
33	How to View and Print your Payslip	Now, we will review how to view and print your payslip. We will review the steps to complete this, then give you some time to click through the steps yourselves.
34	Payslips in Workday *Note: This is a change in terminology with Workday compared to HRS, so there may be some questions. If you or a helper knows the answers, you can respond to them, but if you are unsure, respond with “I’m not sure. I would encourage you to discuss with your supervisor or local HR.”	<p>In Workday, the term payslip is used. You may have called this an “earning statement” or a paycheck or pay stub in the past.</p> <p>Keep in mind that you will not be able to see any of your payroll information from before June 29 in Workday.</p> <p>Anything after June 29 will show up in Workday, but if you are trying to see your earning statement from before June 29, you can go to MyUW under the earning statements tile.</p> <p>Payments made in Workday will have statements visible in Workday. Payments made from HRS (any payments before June 29) will be visible in the payroll tile in MyUW.</p>

35	View and print payslips	To begin, start at the homepage and click the menu button. You will want to navigate to the Benefits and Pay Hub.
36	View and print payslips	What we want to click on is the pay icon. This is along the left side tool bar, and is the fourth icon down from the top.
37	View and print payslips	From the pay icon, it will pop open some other options. You will click payments, which will open another screen.
38	View and print payslips	The screen that will show up is the Payroll Hub. From here, scroll down until you see "All Payslips" and a table underneath. To view a payslip that you want to see, click the "View" button.
39	View and print payslips	If you want to print that payslip, instead of clicking view, click "print"
40	View and print payslips	Once you click the print button, a pop-up will appear that says, "your request is being processed." It will take a few seconds before this will go away and the payslip will automatically show on your screen.
41	View and print payslips	The printable pdf of the payslip will automatically show up. If you want to print that payslip, click the print button in the top right corner. If you do not have access to a printer or need help printing, you can contact your local HR.

42	View and print payslips – Mobile app	<p>Now, if we want to view or print a payslip from our smartphone, we can also do that from the Workday App.</p> <p>From the homescreen, tap “apps” and then select the Benefits and Pay app.</p>
43	View and print payslips – Mobile app	<p>Tap the Benefits and Pay hub at the top of the screen.</p> <p>From the dropdown, tap “Payments”</p>
44	View and print payslips – Mobile app	<p>On the next screen, find where it says “Pay History” and tap the payslip you want to view or print.</p> <p>At the bottom of the screen, tap “Get PDF.” The pdf will load, and then you can tap “Open pdf” to view the payslip.</p>
45	Payslip overview	<p>Here is a preview of what a payslip might look like. Payslips will look different for each employee.</p> <ol style="list-style-type: none"> 1. Institution name, address 2. Name, employee ID, pay period dates, check date 3. Current and Year to Date (YTD) totals 4. Earnings 5. Employee taxes 6. Pre tax deductions 7. Employer paid benefits

46	Payslip overview	8. Tax withholding 9. Absence plans 10. Payment information
47	Work Time – Print a Payslip Timing: 10 minutes *Note: If people finish early, let them take a 5-minute break and return at an assigned time.	Now we are going to give you some time to access your payslips. You won't be able to print from here, but this will be good practice so you can get to this space in the future if you need to. Follow the instructions, either from your computer or your phone to view and print your most recent payslip.
Resources and Next Steps		
Timing for Section:		
48	Resources and Next Steps	Before we end our session, I wanted to highlight a couple of resources to help you continue your learning, and some next steps.
49	Log off	Before you leave, please log off your computer. Click on the time at the bottom right corner of your screen.
50	Log off	Click on the power icon. Select restart. The screen will turn white and then turn off. You are now logged out of the computer and the device is ready for the next person to use it.
51	HR Guides for Employees	A great place for you to go for help is the HR Guides for Employees. Whether you're looking for guidance, training, or answers to common questions, this directory can help you navigate HR functions in Workday.
52	Next Steps	Here are some next steps for you: <ul style="list-style-type: none"> • Make sure you signed in at the front of the room • Confirm the date, time, and location of your next session <ul style="list-style-type: none"> ○ Contact your supervisor for help • Practice logging into Workday

53	Thank You!	Thanks for being here today! If you have any questions or need support, contact your supervisor.