Facilitator Guide	
Course Title	Workday In-Person Training Series – Week 3
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	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]. With us here today to help are [introduce helpers]. [Allow helpers to introduce themselves – their names, where they work, etc]. If you haven't yet signed in, we will bring the sign-in sheet to you, so you can raise your hand.
3	What to Expect	So, let's talk about what you can expect to do during our time together. We will... • 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. Some things we will not be able to do today...

		• answer personal employee questions ○ 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 ○ 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	Here is an overview of today's learning objectives. By the end of today's session, you will know how to: • Update direct deposit • View time off balances • Request time off • Understand the Compensation tab • Apply for UW jobs as an employee • Apply for Blue Collar Multi-Shift (BCMS) jobs • How to get help
5	Agreements for Today	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. **Stay engaged** – Listen during the presentation and use the work time to practice and explore. • This will help you understand what to do during the practice time, so make sure you are listening and following along. **Ask questions** – Raise your hand if you have a question or need help during the work time. **Don't get too far ahead** – Stay with the rest of the group so you don't get lost.

		• Try not to get off task because it may be difficult for you to get caught back up. **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. **If you think you can agree to these, give us a thumbs up.**
6	**Logging into Workday** **Timing:** 10 minutes • Review instructions • Give group time to get logged in	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. 1. Open Google Chrome (internet browser) on the computer 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**
Update Direct Deposit Timing for Section:		
7	How to Update Direct Deposit	To start us off, we are going to look at how you can update your direct deposit. If you have already had direct deposit setup, that same information will transfer over to Workday, so you do not need to take any action unless you'd like to update your direct deposit information. Workday allows you to add up to 5 separate bank accounts for direct deposit. The system we used before (HRS) only allowed 3 separate accounts. Please note that Workday calls direct deposit payment elections.
8	Update direct deposit	To start this process, you will follow these steps:

		1. From the Workday Home Page, click Menu. 2. Click Benefits and Pay to open the Benefits and Pay Hub.
9	Update direct deposit	3. Then from the Overview page, click Payment Elections
10	Update direct deposit	4. Click edit to update your direct deposit information. You can also click "Remove" to delete your current direct deposit, or you can click "View" to review your direct deposit information. If you want to add an additional direct deposit account, click "Add".
11	Update direct deposit	After you have made the changes to your direct deposit information, you'll receive a pop up message confirming your changes have been saved.
12	Questions?	Provide space for any questions.
How to View Time Off Balances Timing for Section:		
13	How to View Time Off Balances ***Note**: This section, you can allow people to click through the screens as you do it. If the group is not as tech savvy, then don't encourage them to click through as they are listening.	Next up, we are going to review how to view your time off balances. In this section, we are only going to review how to do the steps, so if you'd like to click along with me as I review the instructions, you may do so. Or, you can just follow along with me.
	Taking Time Off ***Note:** Most employees will only need to know about "time off" but there is also a "leave of absence," which would require more approval. If people have questions	In Workday, time off is considered time away from work, which may include vacation, personal holiday, and sick leave. Today, this may be called absence, leave, or time off. In Workday, a leave of absence is when you take time off for a specific reason, like if you are taking an extended leave for a medical reason, or other extended reasons.

	about which to do, the most usual option is “time off.”	If you are taking a leave of absence, contact your local HR. Employees have received their new leave balances starting July 1, 2025
	How to view time off balances	To view your time off balances, start from the Workday homepage. Click the Wisconsin logo to return to the homepage. From the homepage, click the “Menu” Then, click Manage Absence.
	How to view time off balances	From the new screen, you should be able to see your time off balances on the right side of the screen. Scroll down to see how many hours you have available for each type of time off. For question about your time off balances, contact your manager or local HR.
	How to view time off balances – Mobile app	If you want to view your time off balances from your phone, click the apps button, then open the Absence app.

	How to view time off balances – Mobile app	At the top of the screen, you can see calendar, and Balances. Tap “Balances” to open that tab. Scroll down the page to see how many hours you have available for each type of time off.
19	Questions?	If anyone has questions, about how to view time off balances, let them.
Request Time Off Timing for Section:		
20	Request Time Off	Previously, each division across campus had a different process to submit a request for time off. Many have different paper forms that they've used, so this new paper form will make sure everyone has the same one, so if you ever switch divisions, for example, it will be consistent for you as an employee.
21	How to request time off	Instead of using Workday to submit your time off, you will use a paper form to submit a time off request. • Ask your supervisor for a paper form • Fill out the paper form • Return the paper form to your supervisor
22	Request time off form	This is what the paper form will look like. Some divisions have different guidelines about time off, so if you have questions, we’d recommend you ask your supervisor for help. This form is translated and will be the only paper form used to request time off. If you decide to transfer work units, you don’t need to learn how to use a new form. The form is available in CLS supported languages including English, Spanish, Hmong, Tibetan, Nepali and Chinese.
Overview of Compensation tab Timing for Section:		
23	Overview of compensation tab	In this final section of our training, we will look at the compensation page. In this area, it will show you the details and breakdown of your compensation plan. This may include your salary or hourly pay, along with any bonuses, allowances, or lump sum payments.

24	Compensation tab	1. To get started, from the homepage, click the Worker profile in the upper right corner.
25	Compensation tab	2. From the drop down that opens, click the “View Profile” button.
26	Compensation tab	3. From your Worker Profile, look at the red bar on the left to find the Compensation tab. That will bring you to the Compensation Overview page.
27	Compensation overview	The compensation overview page shows you a couple of things. At the top, it displays your total salary plus allowances, total base pay, and the frequency, as well as any additional lump sum payments you may be receiving or have already received. The bottom provides a breakdown of the top box. For example, the screenshot here displays the employee’s compensation plan, which shows they are on an hourly plan. It also shows two allowances: one is a uniform allowance, and one is their supplemental night differential allowance. Next to each, it should show the assignment, or how much money they get for that specific plan.
28	Compensation overview	The bottom box will show off the employee’s compensation plan type, their compensation plan, and assignment. For example, their compensation plan type is hourly, and the assignment for that plan is $18.73 per hour. It also shows that this employee has two allowances: one is a uniform allowance, and one is their supplemental night differential allowance. Next to each, it should show the assignment, or how much money they get for that specific plan.

		If you have questions about your compensation plan breakdown, you can reach out to your supervisor or your local HR.
29	What is a lump sum payment?	One item that may show up on your Compensation overview page is a lump sum payment. A lump sum payment is money that you receive outside of your regular pay. You may receive a lump sum for a variety of reasons. Some examples are: • Night/Weekend/Shift differential pay • Shoe allowance • Performance bonus • Snow removal bonus • Hiring bonus • Referral bonus Some allowances may not receive a notification, but other types of lump sums will.
30	Lump Sum (trades only) ***Note**: This slide is hidden in the presentation, as the majority of the learners are not trades workers. However, there are some sessions dedicated to trades workers, so those audiences will review this information	One item that may show up on your Compensation overview page is a lump sum payment. A lump sum payment is money that you receive outside of your regular pay. You may receive a lump sum for a variety of reasons. Some examples are: • Craftworker Leads add-on • Painter add-on

		• Night/Weekend Differential • Standby Pay Some allowances may not receive a notification, but other types of lump sums will.
31	Lump sum letter	If you do receive a lump sum payment letter, it will appear under the Awaiting Your Action section on the Workday homepage. 1. To see the letter, you can click on the title of the task.
32	Accepting a letter	From the list of your Tasks, Click the one-time payment to see the allowance. Then, click on the document link to see the letter.
33	Accepting a letter	Once you click on the link, it will display the letter on the screen. This is an example of what a lump sum payment letter may look like.
34	Accepting a Letter	Once you have reviewed the letter, Click the “I Agree” box to acknowledge the letter. Be sure to click the Submit button to finish. Note that this letter is not time sensitive. You will still receive the payment on the effective date, but you should try to click the checkbox as soon as possible.

35	Accepting a letter	Once you have submitted, you will receive a "You have submitted" popup notification to confirm your submission.
36	Questions?	
37	Break Time	Provide a break of no more than 10 minutes.
Apply for Internal Positions Timing for Section:		
38	How to apply for a UW job as an employee	Our first topic for today is how to apply for a UW job as a UW employee, or what is called an internal position. An internal job is a type of job that only people who are already employed by the University can apply for. People outside of the University cannot apply for those jobs.
39	Applying for UW Jobs	Previously employees applied for a job at the university on the UW jobs website, jobs.wisc.edu. Employees are no longer going to be using that site to apply for jobs. Instead, you should apply for any new jobs using the Workday website. Workday connects the hiring and onboarding processes. Workday ensures current employee information transfers to new roles, including roles at other campuses. This includes transferrable vacation, personal hours, sick leave; personal information such as your address; and much more. We will look at the steps to get to the Applying for Jobs space in Workday, and then give you time to practice using the system to review open jobs. If you need language assistance when applying for jobs, you can contact Cultural Linguistic Services.

		One thing to note before we look at how to find job postings - All job postings for all Universities of Wisconsin will show up on the Workday Jobs Hub, not just internal positions at UW-Madison. This means you will see jobs that are available at UW-Milwaukee or UW-La Crosse. We are going to look at how you can filter down positions to find the ones that are right for you.
40	Applying for UW Jobs	First, we will go through the process of applying using a computer. 1. From the Workday home page, click on the Menu.
41	Applying for UW Jobs	2. Next, click on Jobs Hub under the Organization tab.
42	Applying for UW Jobs	Here is an overview of the Jobs Hub webpage. There are a couple of key pieces we want to make you aware of on this page.
43	Applying for UW Jobs	1. The most recently posted jobs will show up first. It is important to note that this site will list job postings at all Universities of Wisconsin, meaning you may see job postings from outside of UW-Madsion. We will look at how to filter searches in a bit. 2. To see more jobs, you can click the arrow on the right side of the page to scroll through more recently added jobs.
44	Applying for UW Jobs	3. If you want to view even more jobs, click on the magnifying glass icon to see all open positions.

45	Browse all jobs	Once you click on the magnifying glass to browse all jobs, it will bring you to a new screen that has a lot of information on it. One way to look for jobs is by using the Search Bar if you know the job title or details about the job. The other way to look for jobs is by filtering them to view only the jobs that are relevant to you.
46	Sort the list of jobs	Sorting jobs will be important to help you find the jobs that best suit you and your skills. You can do a lot of filtering, but the ones that are bold on the screen are some key filters to use – **Institution, Location and Time Type**. • Employment Type – These are the employee's contract types. This includes Regular Employment, Temporary Employment, Terminal or Fixed appointments • Institution – This means which University the job is at. • Job Category – This means the employee class, including Faculty, Academic Staff, Limited appointment, or University Staff. • Job Family Group - This is the type of work the job falls under. Such as working in HR, IT, Finance, Facilities, and other types. • Location – This will be a big filter to consider, especially if you want to look for jobs only in Madison. • Remote Type – This will filter jobs by location, meaning onsite, partially remote, or fully remote. • Time Type – This helps filter the jobs between full time and part time. To help you filter and sort jobs, click the check box to see jobs that fall under that category.
47	Finding a job to apply for	4. Once you find a job, click the Job Title to learn more about it.

48	Applying for Jobs	5. Once you find a job that you want to apply for, click the Apply button to start the application process. 6. This will prompt you to upload your application materials that are outlined in the "How to Apply section of the job posting. It is important that you look at the "How to Apply" section of the job posting to make sure you are adding the requested documents. Some common examples would be a resume and a cover letter. There may be some application questions that you also need to respond to. You may also indicate to maintain confidentiality if the university is required to disclose your identity or application materials in the event of an open records request.
49	Submitting the application	7. Before you submit, you are prompted and encouraged to review the information you entered. When you are ready, click the Submit button. You can also save it for later if you'd like. Once you have submitted, you will receive a confirmation message.
50	Reviewing your job applications	If you want to view your applications that you have submitted, see the application status, or withdraw applications within Workday. To do this, you Go to the Jobs Hub Click on My Applications on the left side of the screen. It will then open up a screen that has any jobs you've applied for and you can review them.
51	Apply for Jobs (Mobile App)	If you'd like, you do have the option to apply for jobs on the Workday mobile app. We will walk through the instructions to apply for jobs using the mobile app.

		1. From the Workday home page, tap Apps. 2. Tap the Jobs Hub.
52	Apply for Jobs (Mobile App)	From the Jobs Hub, you will see a similar screen as the web version, but this is more condensed on the phone. 3. Scroll down the page to view Recently Added Jobs. 4. To Browse all jobs, tap Overview at the top, and select Browse Jobs from the drop-down list.
53	Apply for Jobs (Mobile App)	5. You can use the search bar to search for a job if you know the title. You can also use the filter button to narrow your search. The filter categories are the same as the computer version. You can view: • Employment Type • **Institution** • Job Category • Job Family Group • **Location** • Remote Type • **Time Type**
54	**Engagement Activity - Practice: Review Job Postings** **Timing:** 15 minutes	Now we're going to give you some time to explore the Jobs Hub to practice. We aren't asking you to apply for any jobs, but we want to give you the opportunity to see the Jobs Hub for yourself in case you want to apply for a new position in the future. • Follow the instructions to view job postings

	• 3-5 minutes for instructions • 10 minutes for learners to practice and explore	• Identify some jobs that are of interest to you • Remember to use the filters to narrow your search
Apply for BCMS Timing for Section:		
55	How to apply for Blue Collar Multi Shift Transfer (BCMS)	Next up, we are going to talk about how you can apply for a Blue Collar Multi Shift Transfer. Blue Collar Multi-Shift (BCMS) is the UW-Madison process to open up positions in different shifts to current employees first. This process allows employees the opportunity to change to a different shift, like 3rd shift to 1st shift, before the job is opened to external candidates. As with most of the information we've shared, the policies for applying for a blue collar multi shift transfer are not changing, but how you would apply for that transfer are changing. We will look at the space in Workday that you could look for job openings and how you would apply for a transfer.
56	BCMS Transfers	Someone who would apply for this transfer may choose to do so to • change shift times • change departments within a division There are some parameters around who can apply for a BCMS transfer: • You can only apply for this transfer if you are a current, permanent UW-Madison employee. If you are interested in applying for a Blue Collar Multi Shift transfer, • you will use your Workday account to do so.

57	BCMS Requirements	Even if you are a UW-Madison employee, there are additional criteria that an employee must meet to be eligible for a BCMS transfer. 1. Currently employed in the same title within your division 2. No disciplinary letter(s) received within the last 12 months 3. Have not transferred via the BCMS process within the last six months 4. Not currently on probation 5. Meet all required qualifications for the BCMS transfer position The BCMS form must be submitted with your online application or in person to be considered for a blue-collar multi-shift transfer within your division. The deadline to apply is 7 days after the position is posted.
58	BCMS Transfer Form	The blue collar multi shift transfer form is available at the website listed here. The form gives you instructions for what you need to fill out, and how to submit the form online, or in-person. This form is also available in all languages, so once you get to the website, you can select whichever language you use. The languages are: • English • Spanish • Hmong • Tibetan

		• Chinese • Nepali
59	How to apply for a BCMS Transfer	Let’s look at how you would apply for a blue collar multi shift transfer using Workday. 1. First, in the homepage, open the Menu.
60	Apply for a BCMS Transfer	2. Then open the Jobs Hub under the Organization tab. This is the space that we were just looking at to browse available jobs.
61	Apply for a BCMS Transfer	3. From the Jobs Hub, click Browse Jobs. 4. Then, in the search bar, type BCMS and hit enter to see a list of blue collar multi shift jobs available.
62	Apply for a BCMS Transfer	If there are any openings, a list will appear. Each position title will have this information in it: • Job title, • Unit • Shift In the screenshot here, we can see that the job title is a Food Service Assistant Advanced. The unit is with Godon Avenue Market, and the shift time is Midshift. If you want to continue to learn more about the position, click on the Job Posting Title.

63	Apply for a BCMS Transfer	If you are interested in the position and meet all of the job requirements, you can follow the same steps to apply as you would for any other jobs. 5. Click apply 6. The only difference here is that instead of uploading a resume, you will be asked to upload a completed BCMS Transfer form.
64	Apply for a BCMS Transfer	6. As with the internal position, review your information before submitting your application. 7. Once you are certain your information is correct, you'll click Submit. You will receive an email that confirms your application.
65	Apply for a BCMS Transfer	Now, there is an option for you to apply for a BCMS transfer using a paper application. The preferred method is using the online application through Workday, but if you do not have access to a computer, or don't feel comfortable completing the online application, you can use the paper BCMS Transfer form instead. You can request that through your division's Human Resources office, and then work with them to submit the form.
66	Questions?	
How to get help Timing for Section:		
67	How to get help	Before we end for the day, we want to remind you of some of the ways you can get help if you need it after today's training is over.
68	How to get help	1. The first suggestion we have is for you to contact your supervisor. Some of your questions may be related to your actual role, but some of them may be about

		using Workday. We suggest you start with your supervisor, and if needed, they can connect you with your local HR for more help. Another option you have is by attending Cultural Linguistic Serivces's Open computer labs. • These take place on the 3rd Wednesday of every month at 21 North Park Steet, Room 5041. You can show up anytime between 3:30-5pm to ask for help. • You do not need to register or make an appointment. Simply show up and the CLS team will help you with your Workday related questions.
Resources and Next Steps Timing for Section:		
69	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.
70	Log off	Before you leave, please log off your computer. Click on the time at the bottom right corner of your screen.
71	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.
72	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.
73	Next Steps	Here are some next steps for you: • Make sure you signed in at the front of the room • Asl your supervisor if you need help
74	Thank You!	Thanks for being here today and throughout this training series! If you have any questions or need support, contact your supervisor.