TOP WORKDAY FAQs

Getting Started

1. **What is Workday?**
2. **What is a Worklet?**
3. **Where can I find job aids to help me learn how to use Workday?**
4. **How do I access Workday?**
5. **Can I turn off notifications to my Outlook email?**
6. **How can I learn more about Workday?**
7. **Can I print my organization charts from Workday?**

Top FAQs: Accessibility

1. **What is the accessibility from client sites?**
2. **What kind of notifications/alerts does the mobile app provide?**
3. **Is it possible to perform transactions on my iPad, iPhone, or smartphone?**
4. **Does Workday require MDM authentication and how is information secured?**
5. **What access does my manager, PST, or others have to my data?**
6. **What are dashboards in Workday and how do they work?**
7. **What happens to notification approvals and time sensitive process actions when someone is on PTO?**
8. **How are birthdays accessed in Workday and is Workday able to send out reminders of birthdays and anniversaries?**
9. **What do I do if I'm having trouble accessing the Workday app through my Android device?**
10. **What system will capture contingent workers?**
11. **Is Workday able to notify me of the implications and requirements needed before completing a transaction?**
12. **Can I get to job aids from mobile app?**
13. **What access to data do leaders have?**
14. **Is there a proxy or delegation feature that Senior Staff can use (e.g., for EA, Chiefs of Staff) that can help leaders get data pulled, etc.?**
15. **If I have an action or notification in my Workday inbox, will I get an Outlook email as well?**
16. **Is my spouse able to access Workday to actively view our benefits?**
Top FAQs: Recruiting

1. Are internal employees able to see and apply to positions in Workday?
2. Once I apply for a position through Workday, how do I know where my application is in the screening process?
3. Does Workday allow candidates to know where they are in the hiring process?
4. How is Workday used in the recruitment process?
5. Are hiring managers able to track where candidates are in the hiring process?
6. How do I apply for an internal position?
7. Who creates requisitions?
8. Is my manager notified when I apply for an internal job?
9. How do employees know if someone applied to an open req. from their social media account?
10. Can I identify or link to favorite recruiting reports within Workday?
11. Do I have to create five positions and requisitions if I need five people?

Top FAQs: Performance Management

1. How will individuals get access to their Performance Management information that was previously in Career Central?
2. Who sees feedback I’ve received or given?
3. Can feedback be removed from the public profile wall?
4. Are new managers able to see the Feedback, Goals, Annual Summary history of employees when they transfer to them?
5. How do I set or update my Goals?
6. How do I include a Goal that spans multiple years in my Self Evaluation for my Annual Summary?
7. How do I complete the Manager Evaluation for the Annual Summary?
8. As a manager, how do I approve the Goals of my employees?
9. How do I promote an employee using Workday?
10. If I have a question about the Performance Management process using Workday that isn’t in the FAQs, where do I get my answers?

Top FAQs: Benefits

1. I would like to view my current benefit elections and beneficiaries. Can I see that information in Workday?
2. When can I make changes to my benefits in Workday?
3. Can I make changes to my benefits and beneficiaries from home?
4. How do I place a leave request in Workday?
5. Can I update or cancel my leave dates?
6. Am I able to print a benefits confirmation from Workday?
7. Is Tuition Assistance Reimbursement integrated into Workday?
8. How can I begin making benefit changes in Workday?
9. Do I have to record my time on leave in TOL?
10. I need to request military leave. Do I have to attach my orders to my military leave request in order for it to be approved?

11. Will I get a confirmation when I change my address or marital status?

12. I had a life event and made my benefit elections but then realized I need to make another change. What should I do?

13. Where can I go to find more information about the different leave programs that the firm offers?

14. Does Workday include TOL or visibility into time reporting?

Top FAQs: HR Core

1. Are notifications sent to your Career Manager if you don’t complete actions in Workday?

2. What is a Supervisory Organization in Workday?

3. What is the difference between transferring into a new Supervisory Org and transferring into a new IMT?

4. How is a Supervisory Organization created for an employee?

5. Are the Career Manager, Job Manager, and TOL Supervisor tracked in Workday for Employees?

6. What does my Job Manager see in Workday?

Top FAQs: Position Management

1. Does Workday integrate with the capacity planning tool?

2. I see there’s a pay grade attached to a position -- we usually attach the pay grade to a requisition. Does that mean we don’t attach that to the requisition now?

3. Is there a pre-defined set of positions, or do you create a position?

4. What if I want to promote someone and leave them in a position?

5. How do positions move around from team to team?

6. Are there descriptors to describe the roles that people will have?

7. If I leave, how long does my information remain in Workday?

8. How does Workday account for teleworkers in the field of "proximity location"?

9. When would an employee’s position be changed?

Top FAQs: Compensation

1. What compensation transactions do managers complete in Workday?

2. What resources may managers use for guidance to complete compensation actions in Workday?

3. Does Workday display salary range information so employees know how they are positioned in the range?

4. Who can initiate/approve salary changes in Workday?

5. Is HR included in the Compensation review/approval process?

6. How does a manager know when to begin salary planning in Workday?

7. How does an employee’s Job Family impact salary ranges (and eligibility for raises)?

8. What is the exception process for salary increases proposed by managers?

9. How do managers recommend and get approval for promotion increases in Workday?

10. What happens to the salary actions when a manager with salary responsibility transfers during the salary planning cycle?
11. **What happens to the salary actions of an employee if they transfer to another manager during the salary planning cycle?**

12. **What happens to the salary actions for a manager who goes on a LOA during the salary planning cycle?**

13. **What happens to an employee’s salary if they are on LOA during the salary planning cycle?**

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**Getting Started**

1. **Q:** What is Workday?  
   **A:** Workday is a mobile human capital management system built to provide a simple, modern employee and candidate experience that will scale as we grow. It replaces several current people systems—including PeopleSoft (people.bah.com) and Taleo (Career Central Recruiting, Onboarding and Performance)—in favor of one cloud-based technology.

2. **Q:** What is a Worklet?  
   **A:** A worklet is a compact list displayed as an icon (a bubble) on any landing page, providing easy access to tasks and information that are used regularly.

3. **Q:** How does Workday impact staff who are not Career Managers, on a day-to-day basis?  
   **A:** Staff can find opportunities, update personal information, complete self-reviews, provide feedback, request leave and elect/adjust benefits easily, in one integrated system.

4. **Q:** Where can I find job aids to help me learn how to use Workday?  
   **A:** Process-specific job aids, which include step-by-step instructions with screenshots showing you how to complete specific transactions, are available through the Job Aid Worklet in Workday and through the Workday Zone site.

5. **Q:** How do I access Workday?  
   **A:** You can access it from your Booz Allen computer, from a non-Booz Allen computer and from your mobile device. Here’s how:
   - **Laptop:** Go to [https://workday.bah.com](https://workday.bah.com) from inside the firewall on a Booz Allen computer. If you’re on a non-Booz Allen computer, log in via Access.bah.com using your PIN + Tokencode. Tip: Use Internet Explorer 11 for the optimal Workday web experience!
   - **Mobile Device (No MDM required!):** Download the Workday app from the App Store or Google Play (if you do have MDM, it’s already been pushed to you!). Launch the app, enter “bah” in the “Tenant Name” field, and follow the prompts. You’ll need your PIN + Tokencode (or PassPhrase if you’re on the Booz Allen Wi-Fi network) the first time you log in. Setup a PIN and/or use TouchID for easy access (optional).

6. **Q:** How do you handle those who don’t want to put the app on their phones or those who don’t have a Booz Allen asset like a laptop? Can they put the application on their home computer?  
   **A:** If the employee doesn’t want to download the app that is fine; they can log into Workday using any browser from any computer using an RSA token.

7. **Q:** Can I turn off notifications to my Outlook email?
8. **Q:** How can I learn more about Workday?

**A:** You can get information from your manager and/or other Leadership, you can visit the Workday Zone site for resources such as Job Aids and FAQs, and you may also participate in training that will be offered Just-In-Time throughout the year.

9. **Q:** Can I print my organization charts from Workday?

**A:** Yes. These org charts are automatically updated with any changes to your team, and can be expanded in scope to trace back to the CEO. There is a print button in the top right corner and the chart can print as a PDF or PowerPoint.

10. **Q:** How do I manage my phone numbers between Workday and the GAL?

**A:** We do not have that ability in Workday. The phone number that will be on the first page of the GAL will be the firm issued phone. We will pass public phone numbers the employee has added in Workday to the GAL and leverage the Phones/Notes page. This means that a user must page through the info in the properties for an employee to find the other phone numbers in the GAL. Additionally, when an employee adds an alternate business phone number, they must use Client Phone as the device type, if they want that phone number to be passed to the GAL. There is an option to use Landline but that won’t be picked up in the interface to the GAL. Also, phone numbers need to be designated as Public or they won’t flow to the GAL, nor will they be viewable in Workday.

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**Accessibility**

1. **Q:** What is the accessibility from client sites?

**A:** If your client site allows access to the Workday site, you will have the same access as other Booz Allen employees. However, your client site access restrictions take precedence. If your client site blocks access to Workday, you can download the mobile app to your mobile device and access Workday when appropriate.

2. **Q:** What kind of notifications/alerts does the mobile app provide?

**A:** You will receive the same notifications and alerts in your Workday inbox via the mobile app as you will on your desktop version, but only certain transactions will be able to be completed via your mobile device.

3. **Q:** Is it possible to perform transactions on my iPad, iPhone, or smartphone?
A: Yes. Certain transactions are enabled on the Workday mobile app (e.g. requisition creation, candidate feedback, and give feedback) but there are some limitations due to security. For example, compensation actions cannot be processed on mobile app.

4. Q: Does Workday require MDM authentication and how is information stored?
A: No. With Workday, MDM is not required for the mobile app. The Workday mobile app uses encryption for all actions and requires a multifactor authentication. This will register your device, and the mobile app will be authorized for up to 90 days.

5. Q: What access does my manager, PST or others have to my data?
A: Access is based on existing roles and security permissions. Your manager has access to things like your emergency contacts and home address, while your colleagues can only see your 'public' information like 'work location' or 'work phone.' If your career manager is a Senior Associate or above, they are also able to view your compensation in Workday. Workday system administrators do not have access to Booz Allen data. Only Booz Allen staff with proper authorization and credentials can access Booz Allen data. This ensures the best possible protection for your personal information.

6. Q: What are dashboards in Workday and how do they work?
A: Dashboards are a series of reports that are accessible based on security role, e.g. Hiring Manager.

7. Q: What happens to notification approvals and time sensitive process actions when someone is on PTO?
A: Approvers can delegate certain actions or approvals to appropriate personnel in their absence. As a result, the likelihood for bottlenecks should be reduced when people are out of the office or on leave.

8. Q: How are birthdays accessed in Workday and is Workday able to send out reminders of birthdays and anniversaries?
A: When managers click on the Birthdays worklet, they can see any direct reports who have a birthday within the next 2-week period. Managers do not see the birth year so a person's age remains private. No. However, managers have access to their employees’ hire dates and years of service in Workday. In addition, from their home page, managers can see direct reports who are celebrating birthdays and anniversaries in the next two weeks. This information is also available in some management reports.

9. Q: What do I do if I'm having trouble accessing the Workday app through my Android device?
A: This seems to be happening on certain devices. The same security settings should be available for all devices that are experiencing this issue. Here are the steps on an S7 running Android 6.0.1

1.) Go to settings (the gear on the screen pull down at the top right)
2.) Go to the "Personal" tab
3.) Click "Lock screen and security"
4.) Scroll down to find "Other security settings"
5.) Click "View security certificates"
6.) Make sure you are on the "System" tab (this is the default). Give it a few seconds to load all the certs.
7.) Scroll down to find the certificate named "GlobalSign nv-sa"
   You will find that this is "Off"
8.) Click the Off/On toggle, which will bring a "Security certificate" pop up
9.) Scroll to the bottom of the pop up to find the "TURN ON" button and click it.
10.) If a confirmation dialogue pops up, click OK.
11). RELAUNCH THE WORKDAY APP

10. Q: What system will capture contingent workers?
    A: My Access will capture the non-employee population. Only contingent workers that need access to Workday for their role and duties will have access (e.g. contract recruiters.)

11. Q: Is Workday able to notify me of the implications and requirements needed before completing a transaction?
    A: No. The system is designed as the place for you to complete your transactions once you decide on what you want or need to do. You will have access to Job Aids that will give you a "heads up" on the implications and requirements prior to completing transactions. You can cancel certain transactions after the "to do" is generated, just in case you change your mind or make a mistake.

12. Q: Can I get to job aids from mobile app?
    A: Yes, you can get to job aids from the mobile app on your mobile device, but it is not through the Job Aids worklet like on the desktop interface. In the mobile app, navigate to Dashboards>Mobile Reports>Job Aids.

13. Q: What access to data do leaders have?
    A: Leaders have access to the employee data for staff within their pyramid/reporting chain, known as organization, in Workday. The firm's Risk and Signature Matrices were used to determine the appropriate security rights and approval workflows for our leaders.

14. Q: Is there a proxy or delegation feature that Senior Staff can use (e.g., for EA, Chiefs of Staff) that will help leaders get data pulled, etc.?
    A: There is no proxy feature, but there are some processes in Workday that may be delegated to others.

16. Q: If I have an action or notification in my workday inbox, will I get an Outlook email as well?
    A: All notifications by default are be sent to your Outlook email as well as Workday inbox.
17. Q: Is my spouse able to access Workday to actively view our benefits?
A: No.

Recruiting

1. Q: Are internal employees able to see and apply to positions in Workday?
   A: Yes. Employees will use Workday to access the current Open Positions Report to search and apply for jobs. Once an employee begins applying for jobs, they also can track the progress of their application through Workday.

2. Q: Once I apply for a position through Workday, how do I know where my application is in the screening process?
   A: Once you begin applying for positions through Workday you can go to the Career Worklet, click on “My Applications” and see all the positions you have applied for as well as where they are at in the screening process under the “Candidate Stage” column.

3. Q: Does Workday allow candidates to know where they are in the hiring process?
   A: Yes, security protocols have been configured to allow both internal and external candidates visibility into the status of their application and to better track their progress. The candidate can see updates during the phone screen, review, interview, and decision stages.

4. Q: How is Workday used in the recruitment process?
   A: Workday is the firm’s new online platform for all recruiting related tasks. Job requisitions are created in Workday. All other steps in the recruitment process are also managed through Workday including candidate management, offer details and approvals and onboarding.

5. Q: Are hiring managers able to track where candidates are in the hiring process?
   A: Yes. Workday allows the hiring manager to have more visibility in the process by providing real time data, vs. mid-month and month end. They can view the candidate pool against their requisition, and where they are in the process.

6. Q: How do I apply for an internal position?
   A: You can use Workday to search for and apply for positions within Booz Allen. See the Search and Apply for an Open Requisition job aid for details on the actions and overall process.

7. Q: Who creates requisitions?
   A: In Workday, hiring managers create requisitions. See the Create Job Req for Existing Position and Create Job Req for New Position job aids for more details on the actions and overall process. Job requisitions must be approved by the principal in the hiring manager’s supervisory organization and recruiting before they can be posted.

8. Q: Is my manager notified when I apply for an internal job?
   A: No, your manager will not be notified if you apply for an internal job. We do encourage you to discuss your career goals and aspirations with your Career Manager. Workday provides
an automated tracker of all open positions you apply for that can easily be downloaded and shared with both your Career Manager and your Resource Manager.

9. Q: How do employees know if someone applied to an open req from their social media account?
   A: They will show up under the employee’s “My Referrals” inbox when the potential candidate completes the application.

10. Q: Can I identify or link to favorite recruiting reports within Workday?
    A: Yes. You can create a bookmark for all your favorite reports. Additionally, because the data is real time, the information in the report updates automatically.

11. Do I have to create five positions and requisitions if I need five people?
    A: If they're all the same attributes, then you can create one requisition for multiple positions. If they're different, then you'll have to do different ones. But you can do a requisition and a position simultaneously.

Performance Management

1. Q: How will individuals get access to their Performance Management information that was previously in Career Central?
   A: Please contact the Help Desk at 877-927-8278 or help_desk@bah.com for copies of previous Performance Management documents (e.g., Annual Summary)

2. Q: Who sees feedback I've received or given?
   A: There are multiple ways to give and get feedback against your performance in Workday from Booz Allen employees or your career manager. Feedback is encouraged on an ongoing basis. The person making the feedback request can choose who sees feedback.

   1. Get Feedback – Solicited from a Booz Allen colleague – when you want to receive feedback in Workday from a Booz Allen employee, you can make the feedback you get visible to only you, or to you and your manager. If a Career Manager asks for feedback on behalf of an employee, the Career Manager has the option to select if they want that information shared with the employee. If the selection box is unchecked, both the employee and Career Manager will be able to see the feedback in the feedback history (not on the Profile wall).

   2. Get Feedback – Solicited from external Clients – when you want to receive feedback from a client, you must collect the feedback outside of Workday, but you may cut and paste the feedback into your Goal Activity (see Set or Update Your Goals Job Aid)

   3. Give Feedback – Solicited – when someone asks you for your feedback in Workday, the solicitor of the feedback has the choice of making the feedback visible to himself/herself or to himself/herself AND their career manager. Once in the task,
you, as the provider of feedback, will see who the employee has chosen to see your feedback.

4. Give Feedback – Unsolicited – when you want to give someone feedback in Workday without being asked to do so, you, as the provider, can choose to make the feedback visible to the employee only, the career manager only, or to both the employee and their career manager. Feedback that is unsolicited and shared with the employee and their manager, is fully public and viewable by all individuals who visit that employee’s Workday profile.

Please refer to the employee Give and Get Feedback Job Aid or the Get Feedback on Employee Job Aid for more information.

3. Q: Can feedback be removed from the public profile wall?
   A: Once approved, you can’t rescind feedback that has been posted to a profile wall. Contact the Help Desk at 877-927-8278 or help_desk@bah.com for further assistance.

4. Q: Are new managers able to see the Feedback, Goals, Annual Summary history of employees when they transfer to them?
   A: Yes. Only current managers may view Performance Management information on their employees. Managers can view Performance Management information by clicking the Talent worklet on the Workday homepage and the Performance tab of the worker profile.

5. Q: How do I set or update my Goals?
   A: Please refer to the Set or Update Your Goals Job Aid for details on setting Goals, tracking your progress against your Goals and making updates to your Goals

6. Q: How do I include a Goal that spans multiple years in my Self Evaluation for my Annual Summary?
   A: Any approved Goal with an end date during the performance period will automatically appear in the Annual Summary for that performance year. Refer to the Complete Self Evaluation Job Aid to learn how to manually add or change Goals in your Self Evaluation for your Annual Summary.

7. Q: How do I complete the Manager Evaluation for the Annual Summary?
   A: Career managers cannot begin their Manager Evaluation before receiving their employee’s Self Evaluation which is automatically submitted per the cycle timeline. Please refer to the Manager Evaluation for Annual Summary or Pulse Check Job Aid for step-by-step details on completing and conducting the Manager Evaluation.

8. Q: As a manager, how do I approve the Goals of my employees?
   A: Please refer to the Review and Approve Goals Job Aid for details on approving, adding or editing Goals of your employees.

9. Q: How do I promote an employee using Workday?
   A: Promotions are a 2-step process that include:
      1. Promotion Nomination Form to document justification of the promotion
2. Job Change transaction for Promotion to process the level and salary change, as applicable
   Refer to the Promotions Job Aid for step-by-step guidance and instructions.

10. Q. If I have a question about the Performance Management process using Workday that isn’t in the FAQs, where do I get my answers?
    A. Reference the Job Aids and Videos worklet (Rocket) from the workday.bah.com landing page, reach to your HR Talent Consultant and/or contact the Help Desk at 877-927-8278 or help_desk@bah.com

Benefits

1. Q: I would like to view my current benefit elections and beneficiaries. Can I see that information in Workday?
   A: Yes. You may view your benefit elections, including which dependents you are covering under each plan, and your beneficiary designations in Workday. To view this information, navigate to Benefits > View Benefit Elections.

2. Q: When can I make changes to my benefits in Workday?
   A: Employees can initiate benefit changes in Workday in accordance with governing rules. For life events, such as the birth/adoption of a child or change in marital status, changes can be made within 31 days of the event. All staff can make changes to their benefit elections without a qualifying life event during the firm’s annual Open Enrollment, which happens each year in the fall.

3. Q: Can I make changes to my benefits and beneficiaries from home?
   Yes; if you’re on a desktop computer, you’re able to log in with an RSA token. Otherwise, you are not able to view and make changes to your benefits or beneficiaries.

4. Q: How do I place a leave request in Workday?
   A: To request leave from the firm, you can navigate to Time Off > Request Leave of Absence. You will be required to enter your first day of leave as well as the type of leave you are taking. Depending on the type of leave you are requesting, you may need to attach supporting documentation. PTO, however, is not requested through or tracked in Workday.

5. Q: Can I update or cancel my leave dates?
   A: Yes. If you have not yet submitted your leave request, you can cancel it or change the dates that you originally requested. Once you have submitted your leave request, however, you will need to contact the Help Desk for assistance with making updates.

6. Q: Am I able to print a benefits confirmation from Workday?
   A: Yes. You may view and print your current elections at any time.

7. Q: Is Tuition Assistance Reimbursement integrated into Workday?
   A: No, Tuition Assistance Reimbursement can still be found at http://tcr.bah.com/.

8. Q: How can I begin making benefit changes in Workday?
   A: Employees can initiate benefits changes in Workday in accordance with governing rules. For life events such as the birth/adoption of a child or change in marital status, changes can be made within
31 days of the event. All staff can make changes to their benefit elections without a qualifying life event during the firm’s annual Open Enrollment, which happens each year in the fall.

9. Q: Do I have to record my time on leave in TOL?
   A: Yes. For all paid leaves of absence, you need to continue to charge your time in TOL. Short-term leave without pay and unpaid FMLA also need to be charged in TOL. Unpaid personal and educational leaves of absence do not require time charging in TOL.

10. Q: I need to request military leave. Do I have to attach my orders to my military leave request in order for it to be approved? Do I have to record my time on leave in TOL?
    A: Yes. You need to attach your orders in Workday for your military leave request to be approved. When you create your leave request via the Time Off tab, you can attach your orders into Workday directly.

11. Q: Will I get a confirmation when I change my address or marital status?
    A: Yes. Workday will provide confirmation that your transaction was successfully updated. You can also view the data at any time from your All About Me page.

12. Q: I had a life event and made my benefit elections but then realized I need to make another change. What should I do?
    A: If you are within 31 days of your life event and you realize that you need to make additional changes to your benefit elections after you have submitted your elections, you will need to call the Help Desk for assistance. You will not be able to access your event on your own after you have submitted your elections.

13. Q: Where can I go to find more information about the different leave programs that the firm offers?
    A: To find detailed information about the firm’s different leave programs, visit totalrewards.bah.com.

14. Q: Does Workday include TOL or visibility into time reporting?
    A: No. TOL will be used for time reporting.

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**HR Core**

1. Q: Are notifications sent to your Career Manager if you don’t complete actions in Workday?
   A: No. However, there are a couple of different ways to determine whether a transaction is “stuck” in the process. Those who have “review” or “approve” responsibility in the process can see the status of a transaction. In addition, audit reports can be run to help ensure transactions get completed in a timely manner. Workday allows for more transparency.

2. Q: What is a Supervisory Organization in Workday?
   A: A Supervisory Organization groups employees into a management hierarchy which is like what we recognize today as a manager pyramid. Supervisory Organizations provide the structure for how all business processes and approvals flow in the system. Supervisory Organizations are completely independent (decoupled) from TOL and Account/IMT alignment. An employee can be aligned to a Supervisory Organization that is different from the IMT he/she resides in. It also means that an
employee can be aligned to a Supervisory Organization in Workday and have a completely different TOL Supervisor.

3. Q: What is the difference between transferring into a new Supervisory Org and transferring into a new IMT?
   A: A Supervisory Organization (Sup Org) groups employees into a management hierarchy which is like what we recognize today as a manager pyramid. Supervisory Organizations are completely independent (decoupled) from Account/IMT alignment. An employee can be aligned to a Sup Org that is different from the IMT he/she resides in. The IMT is an organization that groups RCs (to which employees are aligned) into a financial hierarchy to manage budgets. An IMT can have multiple Supervisory Organizations within it, and Supervisory Orgs can span IMTs. Transfers into a different Sup Org will not affect the IMT alignment of an employee unless specifically included in the change request. Conversely, transfers into a different IMT will not change the Career Manager and the employee’s Sup Org unless specifically included in the change request. See separate FAQs on how to change an IMT and how to change a manager.

4. Q: How is a Supervisory Organization created for an employee?
   A: For an employee to be recognized as a manager (career manager) in Workday, they must have a Supervisory Organization assigned to them (this will allow employees to be aligned under them). To create a Supervisory Organization for an employee:
   - A Principal or above validates that the manager designee is in good standing (i.e., does not have a Performance Improvement Plan in-place or an ethics violation) and sends an email to the Help Desk (Help_Desk@bah.com) with their approval of a Supervisory Organization for the new career manager.
   - The Help Desk notifies the appropriate parties in Data Management to have the approved career manager set up properly in Workday. Data Management will create the new Supervisory Organization and send the career manager an introductory email about their role, responsibilities and supporting resources.
   - Once the manager’s new Supervisory Organization is set up in Workday, direct reports can be realigned to him/her in Workday through the appropriate Change Job business process. Please refer to the following Job Aids to support the Change Job process:
     - If receiving manager and employee are in the same IMT the receiving manager will initiate the transfer. Please reference the job aid entitled: Request Manager Change within IMT.
     - If receiving manager and employee are in different IMTs the giving manager will initiate the transfer. Please reference the job aid entitled: Guide: Change Job (includes RC, team, location changes, etc.).

5. Q: Are the Career Manager, Job Manager, and TOL Supervisor tracked in Workday for Employees?
   A: An employee’s Career Manager is visible in Workday. However, an employee’s Job Manager and TOL Supervisor is not captured in Workday.

6. Q: What does my Job Manager see in Workday?
   A: Job Managers have access to information about employees that is considered public (e.g., work contact, organization alignment, job details, management chain).
Position Management

1. Q: Does Workday integrate with the capacity planning tool?
   A: No.

2. Q: I see there's a pay grade attached to a position -- we usually attach the pay grade to a requisition. Does that mean we don't attach that to the requisition now?
   A: The pay grade on a position will follow through to the requisition. The pay grade lives on the position, and a position remains until you do something (close it, change it, etc.).

3. Q: Is there a pre-defined set of positions, or do you create a position?
   A: You create a position. Sometimes these will be assigned from the CSOs to the IMTs rather than be created by a manager. You might have a position at the beginning of the year that doesn’t have a lot of attributes and then as you get ready to hire you may add attributes and create a requisition.

4. Q: What if I want to promote someone and leave them in a position?
   A: You can do this. As an example, you might promote someone but not need to backfill them at the lower level.

5. Q: How do positions move around from team to team?
   A: Positions can be moved to different supervisory orgs as needed like how headcount would be moved.

6. Q: Are there descriptors available to describe the roles that people have?
   A: Yes. There is management level, job profile, job family, and job family groups.

7. Q: If I leave how long does my information remain in Workday?
   A: Per our records keeping policy, information will remain in Workday for 7 years.

8. Q: How does Workday account for teleworkers in the field of "proximity location"?
   A: Teleworkers will align to the closest office in their state. All you need to do is search “home” in the location field and it will pull up the default central office in the state.

9. Q: When would an employee's position be changed?
   A: In Workday, every employee holds a position. This position can be updated at any point with approval by a career manager and principal. The most obvious and frequent occasion for changing positions will be during a promotion, when the team is going to backfill a position. In that case, the team would create a new position to encompass the promotion characteristics, and the employee's old position would be open for hire.

Compensation

1. Q: What compensation transactions do managers complete in Workday?
   A: Workday automates our core compensation processes. Salary actions, to include, Merit increases, Market Salary Adjustments (MSAs), Merit Lump Sum increases, One Time Payments (OTP), Bonus Ranking, and Change Job transactions for Promotion increases are completed in Workday.
Additionally, during the salary planning cycles, there is a dynamic reporting feature that enables managers with compensation responsibility to see how much organizations are spending on salary actions as increases are proposed.

2. **Q.** What resources may managers use for guidance to complete compensation actions in Workday?  
   **A.** Managers with salary planning responsibility have the following support:  
   - [Performance Management and Salary Panning Quick Guide](#) (see Steps 6 and 7)  
   - [Merit and MSA Increases Job Aid](#)  
   - [Request Compensation Changes Job Aid](#)  
   - [Updating Employee Advancement Step in E&SP and ETS Job Family Groups](#)  
   - [Promotions Job Aid](#)  
   - HR Talent Consultant

3. **Q.** Does Workday display salary range information so employees know how they are positioned in the range?  
   **A.** No. Employees will not be able to see the salary range for their position. Career Managers that are Sr. Associate, Chief Engineer/Technologist/Scientist/Technical Specialist or above will have compensation access and can view salary ranges for their direct reports. Employees should talk with their career manager or senior level manager to discuss their positioning in the salary range.

4. **Q.** Who can initiate/approve salary changes in Workday?  
   **A.** Career Managers at the Sr. Associate, Chief Engineer/Technologist/Scientist/Technical Specialist level or above can initiate a salary change action for anyone within their supervisory organization. Compensation actions require approval based on the firm’s [Signature Authority Matrix](#) and requests for approval route up the supervisory organization within Workday accordingly.

5. **Q.** Is HR included in the Compensation review/approval process?  
   **A.** Yes

6. **Q.** Does Workday replace the Salary Action Worksheet (SAW) for managers to complete?  
   **A.** Yes. All salary planning, recommendations and approvals are completed in Workday.

7. **Q.** How does a manager know when to begin salary planning in Workday?  
   **A.** Managers with salary planning responsibility will receive an Outlook email notification and a Workday inbox action (titled *Propose Merit*) which kicks off the salary planning cycle. You may also reach to you HR Talent Consultant with any questions about the timing or required actions for salary planning.

8. **Q.** How does an employee’s Job Family impact salary ranges (and eligibility for raises)?  
   **A.** Job Families do not impact the salary range; however, if an employee’s Job Profile changes, that may have an impact on their salary range. Managers should reach to their HR Talent Consultant to review compensation impacts of Job Profile changes for their employees.

9. **Q.** What is the exception process for salary increases proposed by managers?  
   **A.** Salary actions outside of the guidelines must receive approval from each manager in the management chain (Sr. Associate, Chief Engineer/Technologist/Scientist/Technical Specialist level or above) ultimately routing to the CSO/ISO/Partner/ESG Partner for final approval. HR, in collaboration with the Compensation team will share feedback/guidance with leadership. Managers should reach to their HR Talent Consultant for further guidance about salary exceptions.
10. **Q.** How do managers recommend and get approval for promotion increases in Workday?  
   **A.** Promotions are a two-step process beginning with the Promotion Nomination Form. Once the nomination is approved, the Change Job-Promotion task must then be completed to process the promotion increase and other changes to the employee record, as appropriate (i.e., job profile, supervisory organization, etc.). Promotion actions require approval based on the firm’s Signature Authority Matrix and requests for approval route up the supervisory organization within Workday accordingly. Managers should refer to the Promotions Job Aid or reach to your HR Talent Consultant for further guidance.

11. **Q.** What happens to the salary actions when a manager with salary responsibility transfers during the salary planning cycle?  
   **A.** When a manager transfers WITH their employees **BEFORE** the Propose salary step is completed, the manager and the employees will follow the NEW Supervisory Organization. And, when a manager transfers WITHOUT their employees, the employees will be inherited by the next level up manager in the existing Supervisory Organization for salary actions to be completed.

   When a manager transfers WITH their employees **AFTER** the Propose salary step is completed, the manager and employees will fall under the new Supervisory Organization, but the salary planning grid will remain with the prior Supervisory Organization (to be processed by the next level up manager in that Supervisory Organization). And, if a manager transfers WITHOUT their employees, the employees will be inherited by the next level up Manager within the existing Supervisory Organization.

12. **Q.** What happens to salary actions when an employee transfers to another manager during the salary planning cycle?  
   **A.** The employee will move to the NEW Supervisory Organization and will appear in the inheriting manager’s salary planning grid at the appropriate approval stage.

13. **Q.** What happens to the salary actions for a manager who goes on a LOA during the salary planning cycle?  
   **A.** The HR Talent Consultant will need to contact the Compensation POC who will work with IS to manually move the salary planning grid to the next level up manager within the Supervisory Organization. This process will need to be repeated until the salary grid is submitted by the Senior Staff and Exception Approver.

14. **Q.** What happens to an employee’s salary if they are on LOA during the salary planning cycle?  
   **A.** Employees that go on LOA (Paid or Unpaid) **DURING** the Salary Planning Cycle regardless will stay in the salary planning grid of their supervisory organization. Employees that are on UNPAID LOA **PRIOR** to the launch of the Salary Planning cycle, will **NOT** show on the salary planning grid. Employees that are on PAID LOA **PRIOR** to the launch of the Salary Planning cycle, **WILL** show on the salary planning grid.