MANAGER JOB AID

CREATE A SUPERVISORY ORGANIZATION

Supervisory Organizations are created in Workday and requests are initiated and submitted outside the system by Career Managers or Principals. Requests are submitted to the Help Desk and Data Management creates the new organization in Workday. Upon completion, Data Management contacts the Requestor regarding next steps.

NOTE: Requests require Approval and Submission by a Principal or above. The Help Desk will return requests without appropriate approval and submission for updates.

NOTE: If a Principal or above is initiating, skip ahead to the Principal Job Aid section below.

1. Gather details for new Supervisory Organization. Items to include:
   • Employee Name and ID of New Manager (Receiver of the new Supervisory Organization)
   • Employee Name and ID of New Supervisor (Direct Manager to the new Supervisor)
   • Effective Date
   • Primary Location
2. Send an email to the Principal (Receiving) for approval.
3. Principal reviews the information and coordinates with the initiator regarding any adjustments required for approval through a return email or conversation to finalize.
4. Once the request is approved, the role of the Initiator is complete until Data Management follows up with next steps after the Supervisory Organization is created in Workday.

PRINCIPAL JOB AID

5. Submit request for a new Supervisory Organization to the Help Desk.
   • Call the Help Desk: 877-927-8278
   • Email: help_desk@bah.com
6. Details for the new Supervisory Organization are required when submitting the request. Items to include:
   • Employee Name and ID of New Manager (Receiver of the new Supervisory Organization)
   • Employee Name and ID of New Supervisor (Direct Manager to the new Supervisor)
   • Effective Date
   • Primary Location
7. Help Desk creates a ticket and routes the ticket to Data Management where the Supervisory Organization is created in Workday.
8. Once the Supervisory Org has been set up, Data Management will resolve the Help Desk ticket and instruct the requester to initiate a Change Job to move staff under the new supervisor.

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