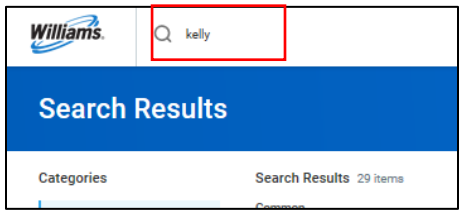
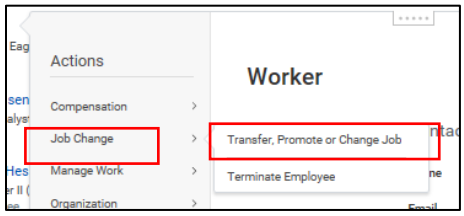
Temporary Assignment

Initiate Temporary Assignment – *Compensation Partner*

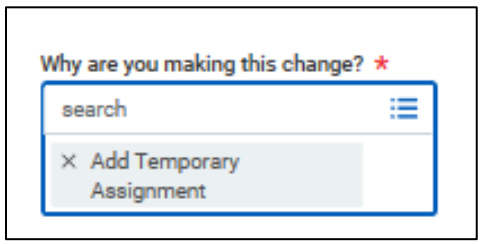
1. In the Workday search bar, type the name of the worker who you would like to assign a temporary assignment.



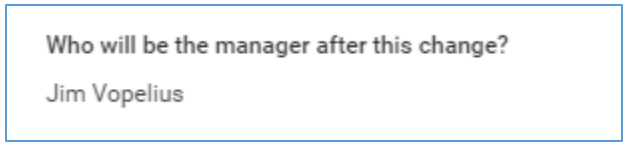
2. From the worker's related actions, click **Job Change**, then **Transfer, Promote or Change Job**.

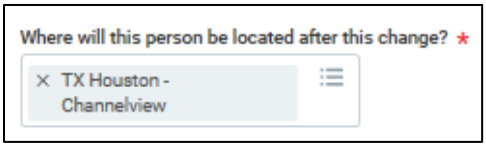


3. From the **Why are you making this change?** dropdown, select **Temporary Assignment**, then **Add Temporary Assignment (or Manage/Change** if you are just changing a location or other element).

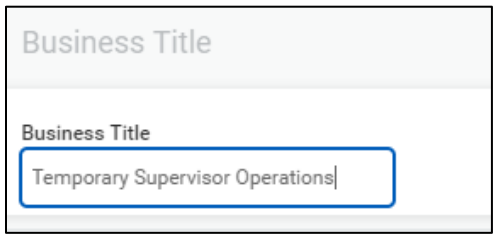


4. If necessary, change the manager and/ or location by clicking the edit pencil on the right side before noting changes then click **Start**.



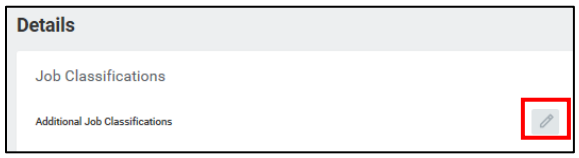


5. On the **Job** page, in the **Business Title** area only, type the temporary title. Do not edit the Position section nor the Job Profile section. For consistency, enter the Business Title with no abbreviations, and preceded by the word "Temporary," as shown below. Construction Project employees should start with "PROJECT".

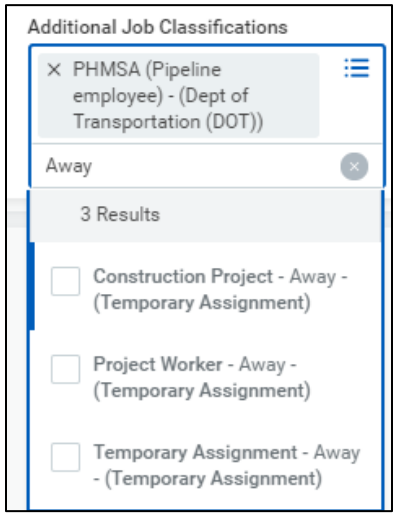


6. Click **Next**. Any new location should appear on the next location page. If not, input it here, click **Next**.

7. On the **Details** page, under **Job Classifications**, edit **Additional Job Classifications.** Note this is different than the job classification in the administrative section that you will not edit. This field allows the assignee to show up on audit reports.



8. From the Additional Job Classifications dropdown, click the appropriate assignment type to note whether the employee is **Away** (>50 miles from home location and allows per diem) or **Home** on one of the following assignment types shown below (Construction or Temporary are most common)**.**

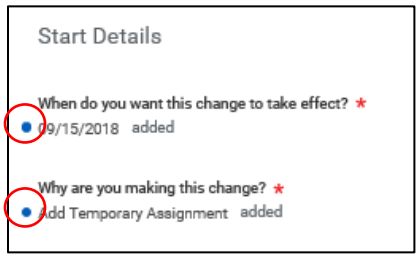


9. Click **Next**.
10. Do not alter the **Organizations** page nor **Compensation** page. The Temp Assignment Partner/Compensation edits the **Compensation** page to **add allowances** (p codes, per diems in step 14. Click **Next** until you get to the job summary page.
11. Review **Job Change Summary**, then click **Submit** to send to the HRBP for review/edit before it moves to the manager.

Approve Job Change (for new assignments) – *Manager and Manager's Manager*

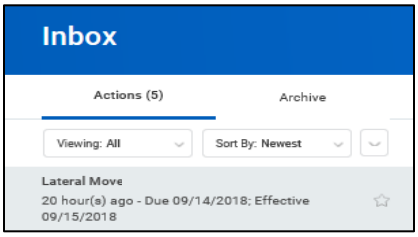
12. Upon completion of the **Job Change** request, the manager will receive a Workday Action to review the lateral move (job change). Managers should open the Action for more information.

Review all pages of the Job Change, noting that all changes are marked with **blue dots**. Click **Submit.**



Adjust Compensation – *Compensation Partner*

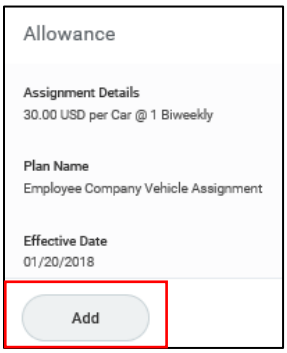
13. Upon approval of the Job Change by the manager, the Compensation Partner will receive a Workday Action to review the lateral move (job change). Open the Action for more information.



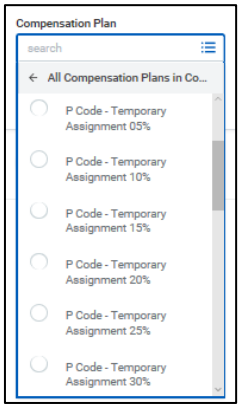
Note: If the worker moving into a temporary assignment is in an exempt role, Notify Payroll to assign the correct pay group.

14. Review to audit that the job details, additional job classification and location all match the Temporary Assignment form. Then go to the Compensation screen, where you will make any compensation adjustments. Here you could adjust the P Code, and/or add a per diem allowance if eligible.

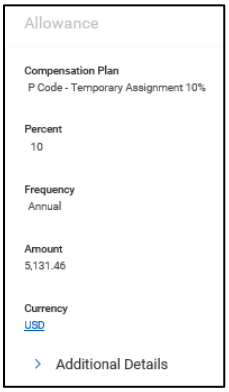
15. **To add a P Code,** scroll to **Allowance**, then click **Add**.



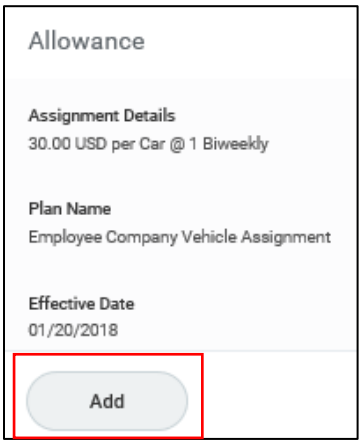
16. In the Compensation Plan dropdown, type "**P code"**, then select the appropriate **Temporary Assignment P Code %**.



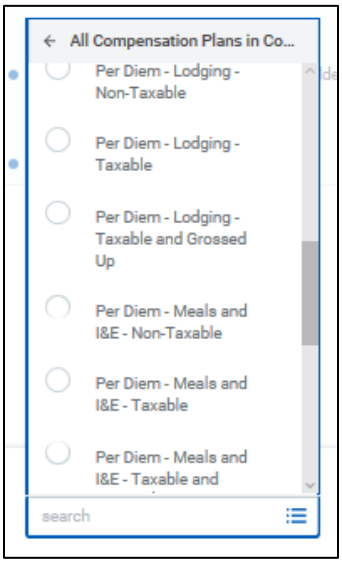
This will auto-fill the **Percent**, **Frequency**, and dollar **Amount**.



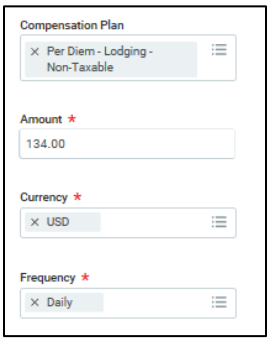
17. **To add a per diem allowance,** scroll to **Allowance**, then click **Add**.



18. In the Compensation Plan dropdown, type **"Per diem"**, then select the appropriate **Per Diem** plan as directed from the Temporary Assignment form (lodging or meal and the correct taxation).



19. The **Amount**, **Currency**, and **Frequency** will autofill, though you can adjust where necessary.

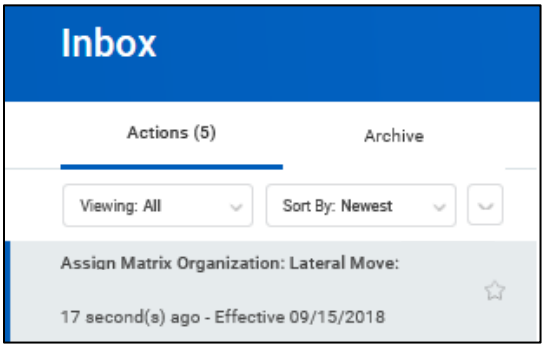


20. Repeat step 17-19 for the second per diem (if eligible). Click **Approve** to complete the compensation change. The job change will be elevated for approval by the worker's manager, manager's manager, and in the case of gross-up per diem, EOT.

    a. VERY IMPORTANT – During manage/change temporary assignments, ALL ALLOWANCES will auto-remove (including bonus and stock plans which should never be changed). Click the revert button to put removed allowances back on (p code/per diem) unless you they are part of the data changing.

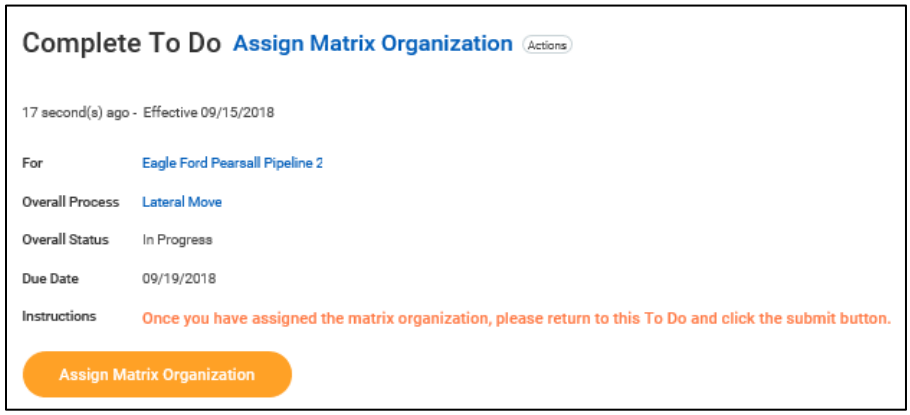
Assign Matrix Organization - *Temporary Assignment Partner (Compensation)*

21. Following approval by the worker's manager, manager's manager, and in the case of gross-up per diem, EOT, the Temp Assignment Partner is responsible for the **Assign Matrix Organization** business process.

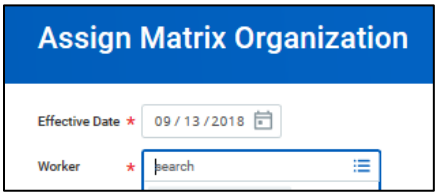


22. If there is no matrix manager, immediately click **Submit** to complete the action. *NOTE* - many construction project employees will have a matrix manager on their Temporary Assignment form. Most are Construction Managers and not true leaders. Though they are listed, only someone with formal supervisory responsibilities is permitted to act as a matrix manager due to Workday security. In this case, treat this step as if there is no matrix manager and click **Submit**.

23. To assign a matrix manager, click **Assign Matrix Organization**.



24. Enter the **Effective Date** and the **Worker Name** from the dropdown. Click **OK** to continue.



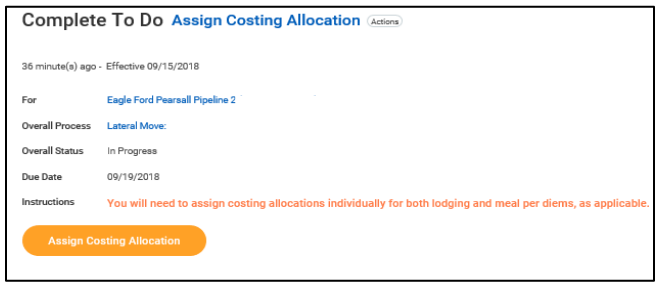
25. Select the **Matrix Organization** from the dropdown. Note that each matrix organization is named by the matrix manager. Input the name of the Matrix leader and click **submit,** then **Done** (one more step needed)**.**

26. Return to the Workday Action item and click **Submit** to complete the process.

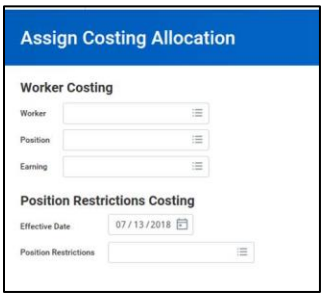
Assign Costing Allocation – *Temporary Assignment Partner (Compensation)*

27. The Temporary Assignment Partner is responsible for the Assign Costing Allocation business process for per diem allowances. You will receive a Workday Action to **Assign Costing Allocation** for the worker.

28. If the Temporary Assignment Form has a work order number in the project cost allocation section, open the Action in your Workday inbox, then click **Assign Costing Allocation**. This step will be completed twice – once for each per diem allowance. If your form doesn't contain anything related to project cost allocation or work order numbers, go to step 37.



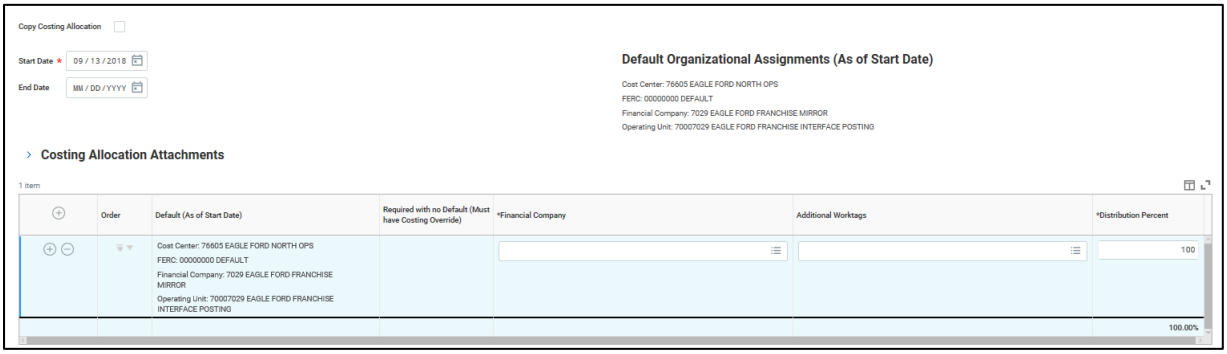
29. Enter the **Worker** name and **Earning** only. Do NOT enter the Position or any Position Restrictions.



30. Click **OK** to continue. For employees who are not on assignment or those who haven't had per diem costs allocated before, the start date will default to the current date.

31. Input the **Start Date** of the assignment. Leave the end date blank.

    a. *NOTE* - If the employee has previously worked on an assignment with a cost allocation or if you are processing a location change with new work order number, there may already be data in this field. Go to step 37a, for how to process this type of individual.



32. **Input** the work order number (WO#) that is in the project cost allocation field of the Temporary Assignment form into the Additional Worktag field and the percentage allocation. Click **Enter**.

33. A list of project tasks will come up. **Select Checkbox** next to the most appropriate task (usually Construction Inspection). Click **Enter**. This is an important part of correctly tracking project costs.

34. If there are multiple work order numbers provided, click the + sign inside the circle in the left column to bring up another row and repeat for each work order number.

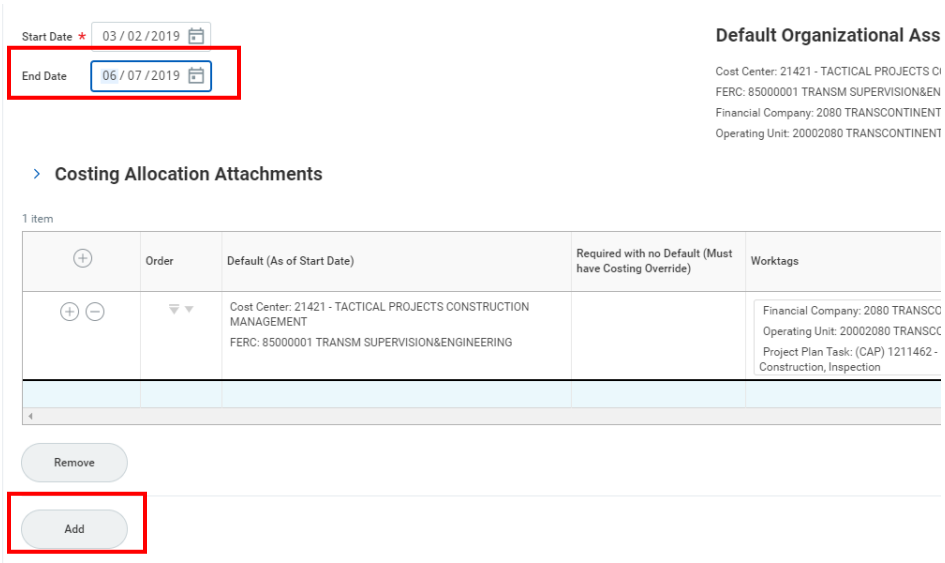
35. Click **Submit**, then **Done**.

36. From to the Workday Action item to **repeat steps 29 through 35** to complete the process again for the other per diem item. The inbox item is still incomplete.

37. Go back to the inbox item and click **Submit** to complete the cost allocation inbox item.

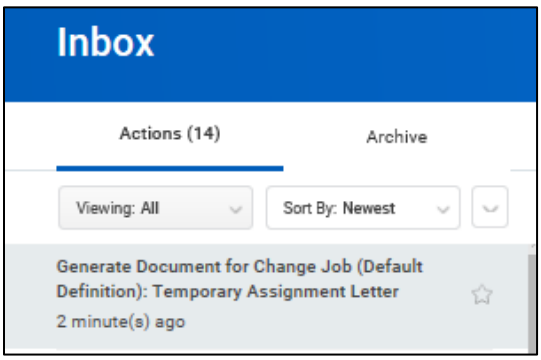
a. If you are processing a location change or just inputting a new work order project cost allocation for a temporary worker, data will already be in the field shown in step 36 above.

b. You will need to put an end date on the existing per diem allocation (usually the date the other location/assignment wraps up), then click the **Add button** to input the start date for the new allocation and complete steps 29-35. In the example below, the person ends 6/7 and needs to add a new code.

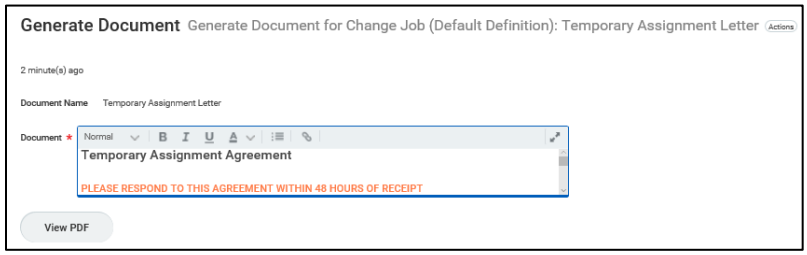


Generate Temporary Assignment Letter – *Compensation Partner*

38. The Compensation Partner is responsible for generating the Temporary Assignment Agreement and will receive a Workday Action prompting them to do so.



39. Workday will default much of the information, but you should review the letter and adjust, entering specific data when necessary. For the end date, highlight pre-populated text and input “TBD”. You may have to manually input the Matrix Manager name. Be sure the correct per diem amounts show and the correct taxation. Verify the start date and pcode. If there are no allowances, input NONE.



40. The Compensation Partner can put a note in the business process instructing the employee to eSign the letter. None of the changes go into effect until the employee signs.

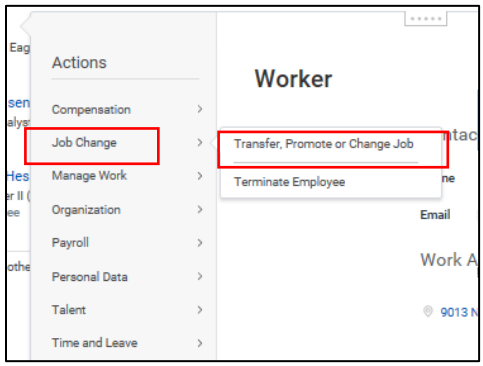
Note: The HRBP and employee can view the letter on the employee's Personal tab.

41. Click **Submit** to distribute the letter to the employee, who will sign the document via DocuSign, completing the Temporary Assignment process.

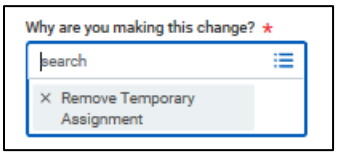
Remove Temporary Assignment – *Temporary Assignment Partner*

42. In the Workday searchbar, type the name of the worker for whom you would like to remove a temporary assignment.

43. From the worker's related actions, click **Job Change**, then **Transfer, Promote or Change Job**.



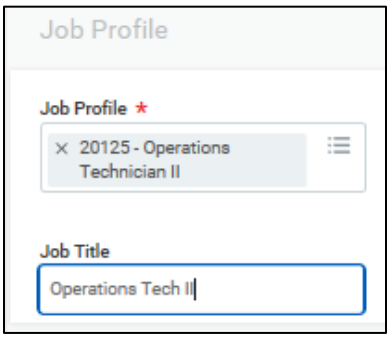
44. From the **Why are you making this change?** dropdown, select **Temporary Assignment**, then **Remove Temporary Assignment**.



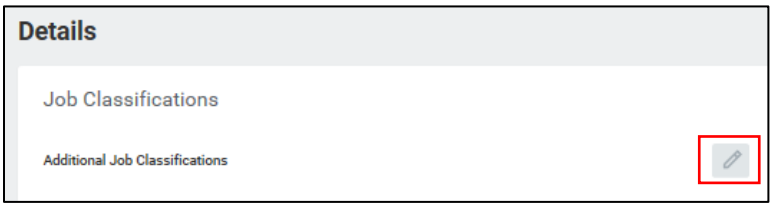
45. Make sure the **Location** reflects the original work "home" location noted on the Temp Assignment form.

46. Click **Start** to continue.

47. On the **Job** page, adjust the **Business Title** so that it reflects the **Job Profile** title (remove Temp or PROJECT titles).



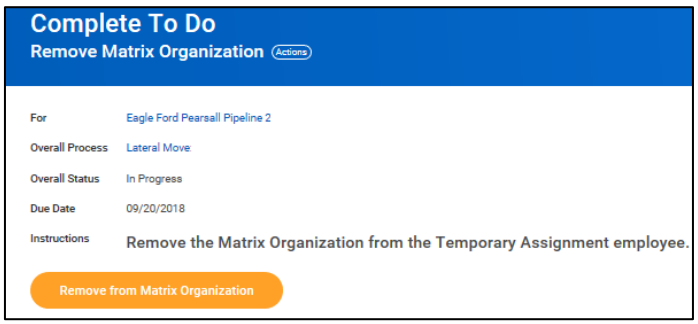
48. On the **Details** page, under **Job Classifications**, edit **Additional Job Classifications** to remove the temporary job classification by clicking the "x" next to the Home or Away. This will remove the employee from any Temporary Assignment audit reports.



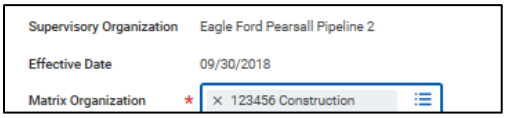
49. Click **Next** until you reach the **Compensation** page. Workday will remove all temporary assignment-related compensation elements, such as P Code or per diem allowances. Verify that this is done accurately and be sure the bonus, merit and stock plans do not fall off. If they do, click the revert arrow.

50. Click **Next**, then **Submit** to complete the request. You will receive a To Do to **Remove Matrix Organization**. If there is no matrix manager, go to step 55 and make a comment as needed.

51. Click **Remove from Matrix Organization**.



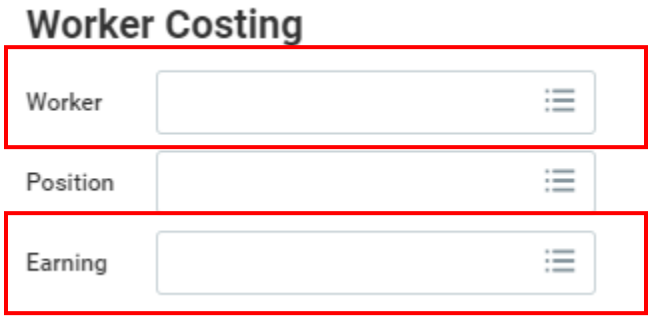
52. Enter the **Effective Date** and **Worker**.
53. Select the **Matrix Organization** from the dropdown.



54. Click **Submit**, then **Done**. This is not yet complete.
55. In the Workday inbox action item, click **Submit** to complete the process.
56. The Temp Assignment Partner will now complete the Assign Costing Allocation business process, completing the temporary assignment removal.

Remove Costing Allocation – *Temporary Assignment Partner*

1. The Temp Assignment Partner will remove the cost allocation via a Workday inbox item. Go to the employee's compensation screen to see what type of per diem(s) the employee has so you know what to remove.
2. From your Workday inbox item, click the orange **Remove Costing Allocation** button. Input the work **name** and the **earning** only. Type one per diem into the earning field.



3. Input the effective date the costing allocation ends (usually the start of a new pay period). Do not delete the cost allocation nor overwrite it since the employee may have items that still need to be entered in arrears. Click **Submit**. Repeat this step for the other per diem and click **Submit.** The inbox item is still not complete.
4. From the Workday inbox item, click **Submit** to complete the process.