



**THE OHIO STATE UNIVERSITY**

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COLLEGE OF  
EDUCATION AND HUMAN ECOLOGY

# Manager Training

**Brought to you by your EHE HR Team**



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# Training Overview

## ▶ Manager General Overview

- What is a Manager's responsibilities in supporting their Employees?
- What is a Manager expected to do in Workday?
- When should a Manager contact their HR Consultant?

## ▶ Managing Employees through the Work Lifecycle

- How does a Manager hire an Employee?
- How does a Manager use Performance Management as a helpful tool?
- How does a Manager make changes to their Employee's position?
- What does a Manager need to do when an Employee's employment ends?

## ▶ Wrap-up and Questions



# What are a Manager's responsibilities in supporting their Employees?

- ▶ Leadership and Direction
- ▶ Performance Management
- ▶ Communication and Feedback
- ▶ Training and Development
- ▶ Issue Resolution
- ▶ Promoting Culture and Values



# What do Managers do in Workday?

- ▶ My Team Management Dashboard, Inbox and Notifications in Workday



Search



## My Team

### Actions

Terminate

Create Job Requisition

End Job

### View

My Org Chart

Timeline

Headcount

Organization Directory

My Leadership Roles

More (19)



Darlene Velez



Jade Swint



Jessica Hanz



Katelyn Tatum



# What do Managers do in Workday? (Cont'd)

## ▶ Managing Employee Time and Absence

- ▶ Ensure hourly employees are entering their hours worked every week.
- ▶ Review and approve time entries weekly, ideally every Monday
- ▶ Review and approve time off requests
- ▶ Ensure employees on a continuous leave (FMLA) of absence have time off entered and approved
- ▶ Review and Approve all Return from Leave requests



# What do Managers do in Workday? (Cont'd)

- ▶ **Supervisory Organizations**
  - ▶ What are they and why do they matter?
- ▶ **Monthly Employee Certifications**
  - ▶ Monthly Employee Certification vs. Effort Certification
  - ▶ Audit Compliance Requirement
- ▶ **Notifications Regarding Sup Orgs**
  - ▶ Workday Inbox
  - ▶ What do they mean
  - ▶ When to Contact your HR Consultant



## When should a Manager contact their HR Consultant?

- ▶ **When there is a change to an employee's work or position**
  - ▶ Hiring, resignation or retirement of an employee (faculty, staff or student employees)
  - ▶ Adjustment and/or changes to an employee's position description
  - ▶ Additional work performed outside regular duties and/or compensation change
- ▶ **When staffing needs are not meeting the operational requirements.**
  - ▶ A reassignment of duties is needed
  - ▶ Your department requires a strategic review
- ▶ **When performance or behavior concerns arise.**
  - ▶ Employee is struggling to meet performance expectations
  - ▶ Employee exhibits behavior that does not align with organizational standards
- ▶ **Important-** Consult with your HR Consultant before having any discussion with the employee regarding these matters





# How does a Manager hire an Employee?

- ▶ **Schedule an In-Take Meeting with your HR Consultant**
  - ▶ Intake meeting will also include EHE Talent Acquisition Consultant
  - ▶ Discuss the needs of your department
- ▶ **Complete the HR Action (HRA) Form in DocuSign**
  - ▶ The HRA form is NOT approval for the position. It is the review and approval of funding source.
- ▶ **Enter Job Requisition into Workday**
  - ▶ You (or your Manager Liaison) are responsible for entering the Job Requisition into Workday.
  - ▶ Manager Liaison is only for Faculty Administrative support for Workday entry.
- ▶ **HR Consultant will review the Job Requisition**
  - ▶ HRC will review and approve Job Requisition and attach all preapproval forms.
  - ▶ Talent Acquisition Consultant (TAC) will review and approve posting of the position.



# How does a Manager hire an Employee? (Cont'd)

- ▶ **Job is posted by Talent Acquisition Consultant (TAC)**
  - The Talent Acquisition Coordinator (TAC) will email the manager the posting information.
  - The HR Consultant (HRC) will email you all the tools and materials needed for a successful search.
- **The TAC will forward all applicants who meet minimum qualifications to the manager for review.**
  - Review of applicants is completed in Workday, where you will select the applicants you want to interview
- ▶ **Interview applicants and identify a candidate**
  - ▶ Select the best qualified applicant for hire and notify the HRC of your choice.
  - ▶ Once approved, hiring process begins via WD.



# How does a Manager hire an Employee? (Cont'd)

- ▶ **New Employee Orientation**

- ▶ Initiated by the University

- ▶ **EHE Onboarding**

- ▶ HRC will provide the Manager an EHE Onboarding Plan and Instructions



# How does a Manager make changes to their Employee's position?

## ▶ What constitutes a change?

- A change to the position description, pay, FTE, appointment type (temporary, term, or regular), or an extension of the employment end date.

## ▶ Meet with your HRC to determine how to proceed. Your HRC will:

- ▶ Collect information and provide resources to determine best plan of action
- ▶ Align request with policy and guidelines
- ▶ Obtain HRA approval
- ▶ Enter the change into WD and move it through the approval workflow
- ▶ Send memo to employee and manager regarding change and file it in Onbase - employee's personnel file



# How does a Manager use Performance Management as a helpful tool?

- ▶ **Setting SMART Goals**
  - ▶ Within first 30 days of employment
  - ▶ In July of the evaluation year (July 1 - June 30)
- ▶ **Coaching and Mentoring**
  - ▶ Coaching Notes due January 31<sup>st</sup>
  - ▶ Mentor and coach throughout the year
  - ▶ Adjust goals if needed throughout year
- ▶ **Year-End Review**
  - ▶ Due June 30<sup>th</sup>
  - ▶ Should acknowledge and document performance throughout the year
- ▶ **Evaluating Flexible Work Agreement (FWA)**
  - ▶ Manager **MUST** approve the FWA via HR Connection!



## What should a Manager do when an Employee ends their Employment?

- ▶ **Reach out to your HR Consultant as soon as you learn that an employee intends to end their employment (includes Students)**
  - ▶ Provide the last date of work
  - ▶ Retirement and/or Resignation
  - ▶ Leaving the University or moving to another position in the University
- ▶ **The employee will enter their resignation in Workday:**
  - ▶ only if the employee is leaving the University.
  - ▶ No Resignation is to be entered into WD if moving to another position in the University
  - ▶ Manager will need to approve in WD
- ▶ **Off-boarding**
  - ▶ Must collect all university issued property
  - ▶ Provide Exit Interview



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# Questions?



# Addendum/Helpful Resources

- ▶ EHE HR page: <https://portal.ehe.osu.edu/office-human-resources>
- ▶ OSU HR page: <https://hr.osu.edu/>
- ▶ **Workday Resources:**
  - ▶ Search for [knowledge articles](#) on the Administrative Resource Center (ARC) for more guidance on using Workday as a Manager
- ▶ **New Employee Resources:**
  - ▶ **HR Connection:** [hrconnection.osu.edu](https://hrconnection.osu.edu) (requires logging in using your OSU credentials); (614) 247-myHR (6947) ; [hrconnection@osu.edu](mailto:hrconnection@osu.edu)
  - ▶ [EHE HR Onboarding page](#) - Includes a number of helpful resources
  - ▶ [New Buckeye Orientation: Becoming an Ohio State Employee](#) - Your new employee should be completing this if they are new to the University





# Addendum/Helpful Resources

## ▶ Performance Management Resources:

- ▶ [Click here](#) to access the Buckeye Performance Management tool
- ▶ Access the Buckeye Performance Leader Training Guide [here](#)
- ▶ Take the [Essential Leader Conversations Course](#) for guidance on topics such as setting expectations, giving feedback, career development, and motivation & recognition
- ▶ Faculty, staff and student employees may need to submit a [Flexible Work Agreement](#) for purposes of accurate tax reporting.

## ▶ Offboarding Resources

- ▶ Visit the [EHE HR Offboarding page](#) for helpful resources
- ▶ OSU's HR Department has a [“Leaving Ohio State” webpage](#) full of information for what happens for the departing employee when they leave Ohio State
- ▶ Retiring employees will find OSU's [“Prepare to Retire” webpage](#) to be a valuable resource