Workday for Travelers: Training Aid

Getting Started

Welcome to Workday! Login to Workday to get started.

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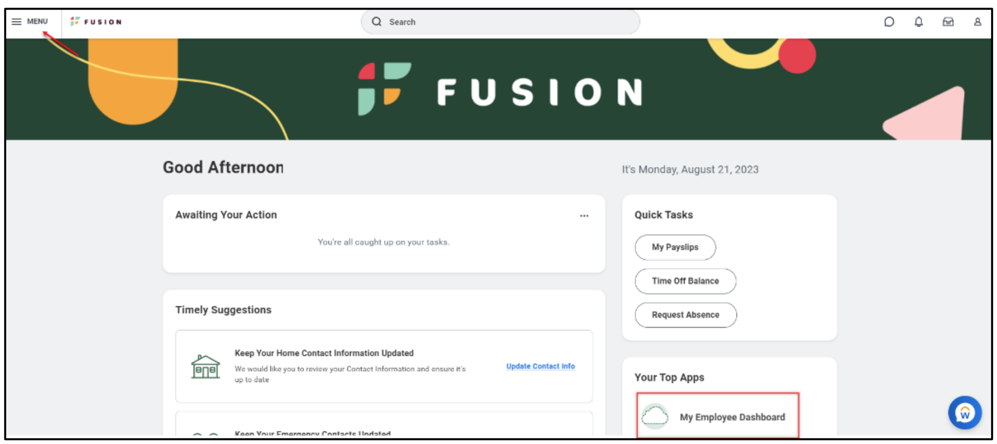
Personal and Contact Information

View Personal and Contact Information

From the Home page:

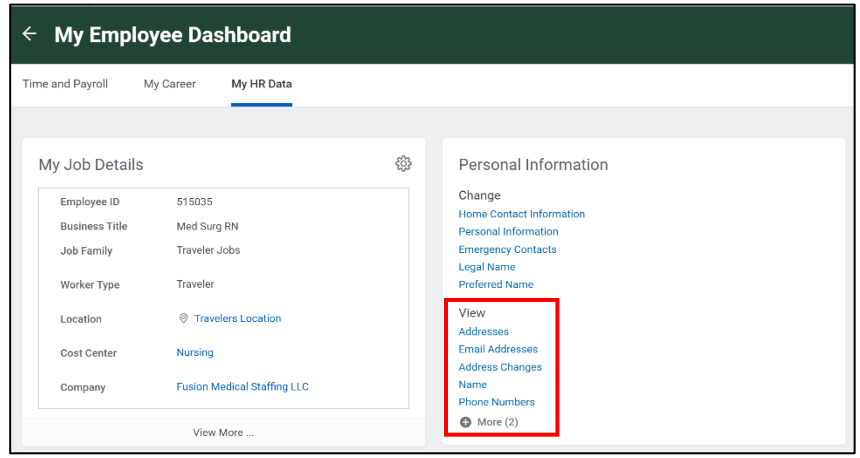
1) Go to *Your Top Apps* and select **My Employee Dashboard.**



Note: You may also manually search for the employee dashboard or use the *Menu* drop-down to find the dashboard.

2) Under the **My HR Data** tab, find the *Personal Information* card. Select any of the blue clickable links to view the details.

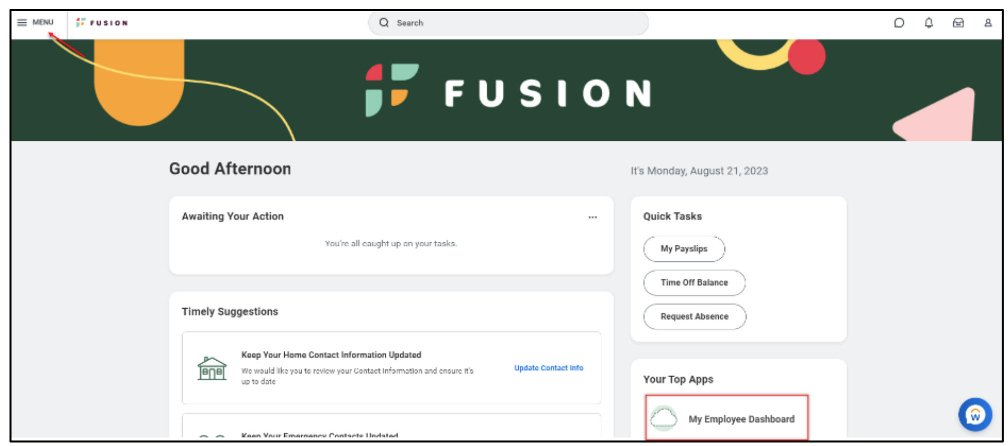
Note: Click **+More (#)** to see additional options.



Change Personal Information

From the Home page:

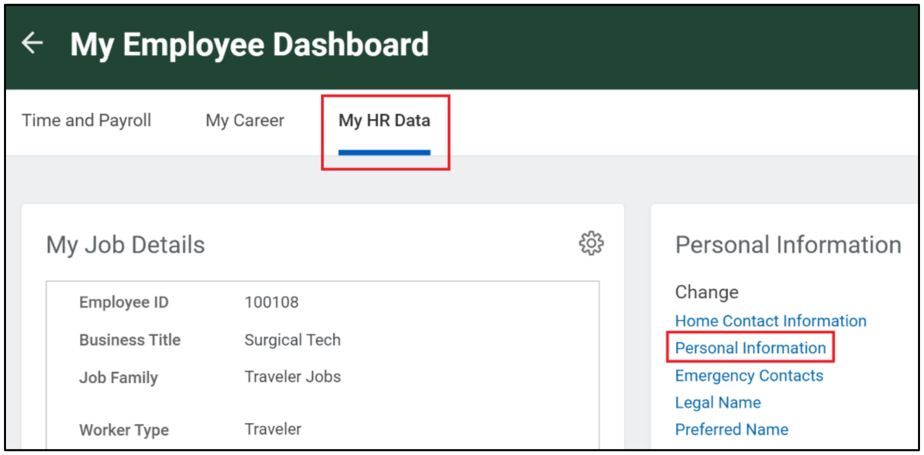
1) Go to *Your Top Apps* and select **My Employee Dashboard.**



Note: You may also manually search for the employee dashboard or use the *Menu* drop-down to find the dashboard.

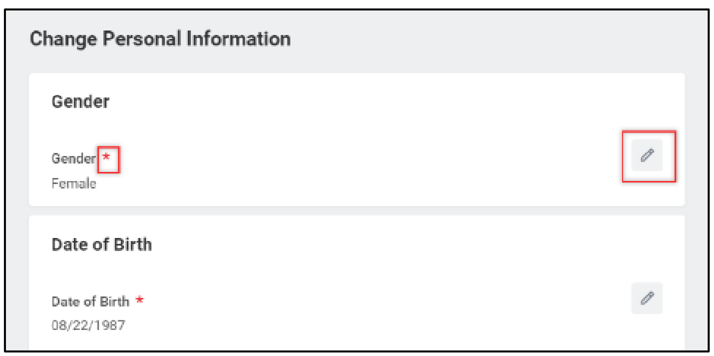
2) Click the **My HR Data** tab.

3) Find the *Personal Information* card and select **Personal Information** under *Change*.



4) Click the **Edit** (pencil icon) to make changes.

Note: Fields marked by a red asterisk (*) are required.



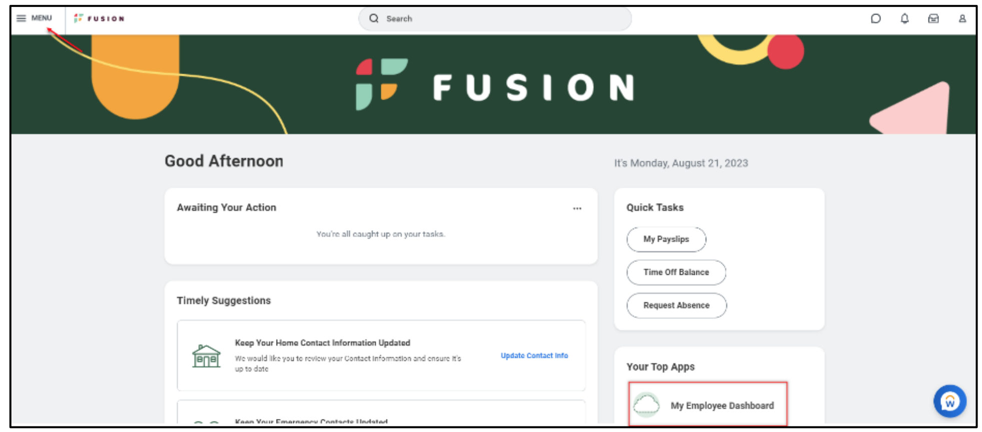
5) Update the fields as desired, then select **Save** (check mark icon).

6) When you are finished making changes, click **Submit.**

Change Contact Information

From the Home page:

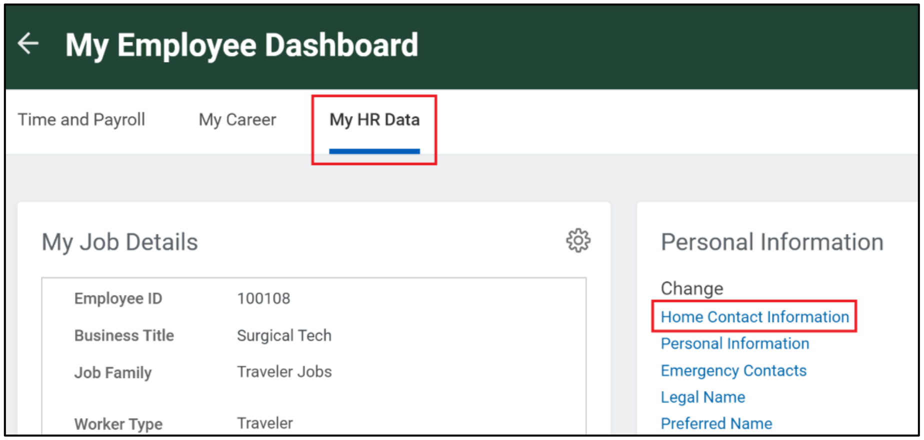
1) Go to *Your Top Apps* and select **My Employee Dashboard.**



Note: You may also manually search for the employee dashboard or use the *Menu* drop-down to find the dashboard.

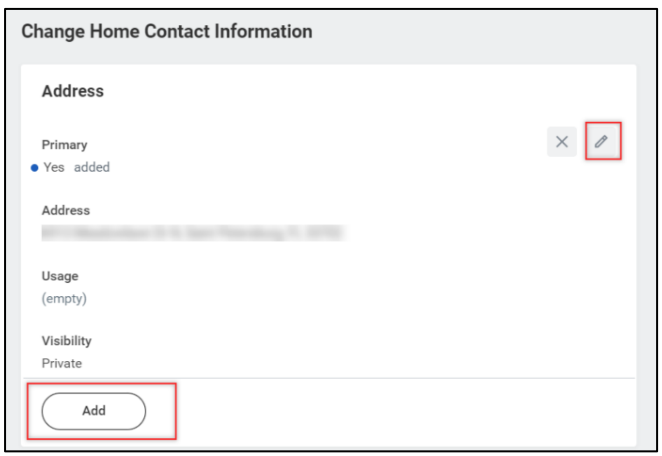
2) Click the **My HR Data** tab.

3) Find the *Personal Information* card and select **Home Contact Information** under *Change*.



4) To make any changes, select the **Edit** (pencil icon) and update the desired fields. To add an additional contact method, select the **Add**.

Note: You must enter a primary address, phone number, and email address.



5) When you are finished, click **Save** (check mark icon).

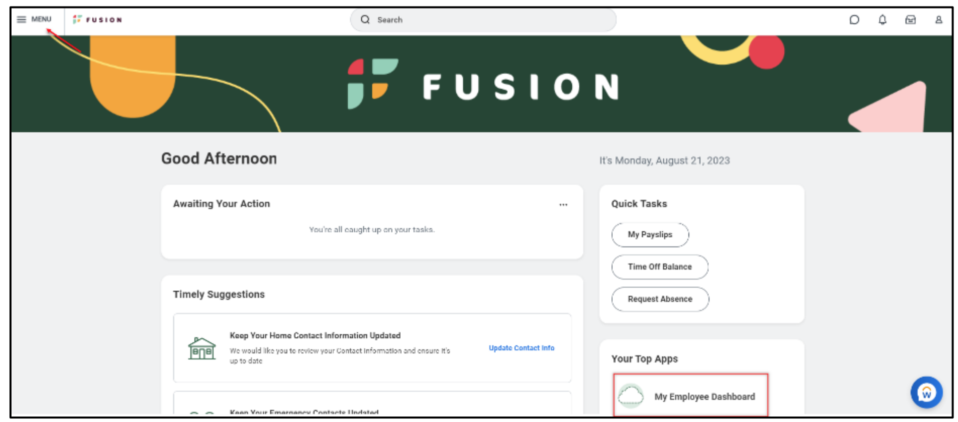
6) Click **Submit**.

Note: If you change your primary home address, you will need to navigate to your Workday Inbox to review and update your tax withholding forms.

Change Legal or Preferred Name

From the Home page:

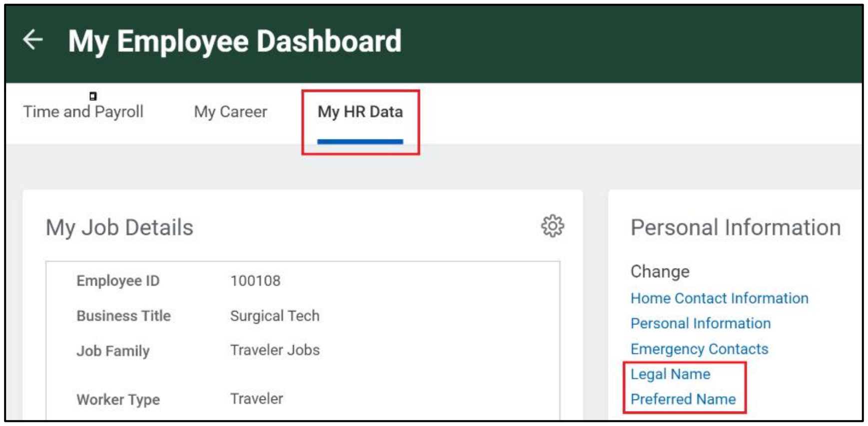
1) Go to *Your Top Apps* and select **My Employee Dashboard.**



Note: You may also manually search for the employee dashboard or use the *Menu* drop-down to find the dashboard.

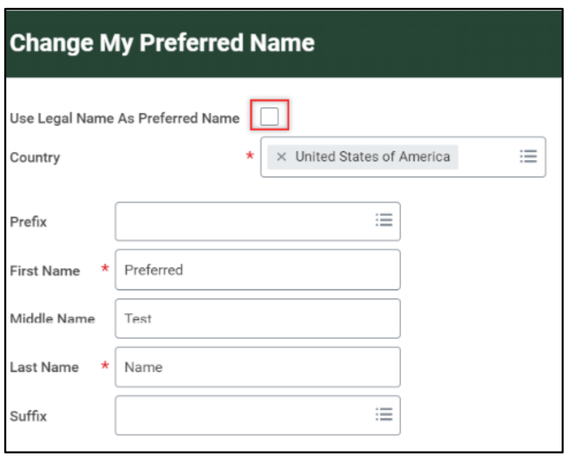
2) Click the **My HR Data** tab.

3) Find the *Personal Information* card and select **Legal Name** or **Preferred Name** under *Change*.

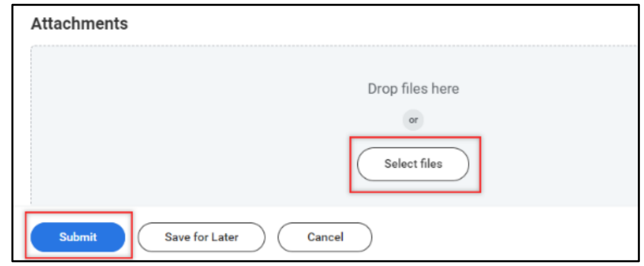


4) Update the desired fields, first and last name are required.

Note: If changing Preferred Name, uncheck the **Use Legal Name as Preferred Name** checkbox. Your last name MUST match your Legal Last Name.



Note: If changing Legal Name, you are required to attach a copy of your social security card. Under *Attachments*, click **Select Files** to upload.



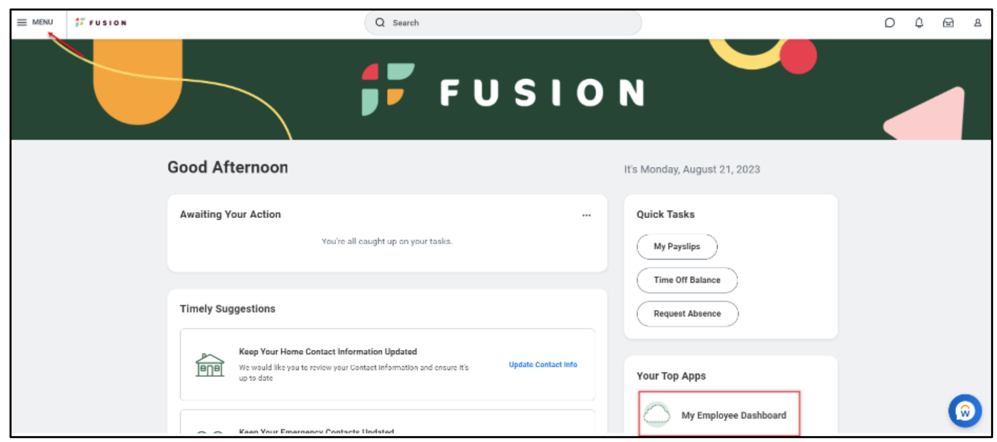
5) Click **Submit.**

Note: All legal name changes will route for approval.

Change Emergency Contact(s)

From the Home page:

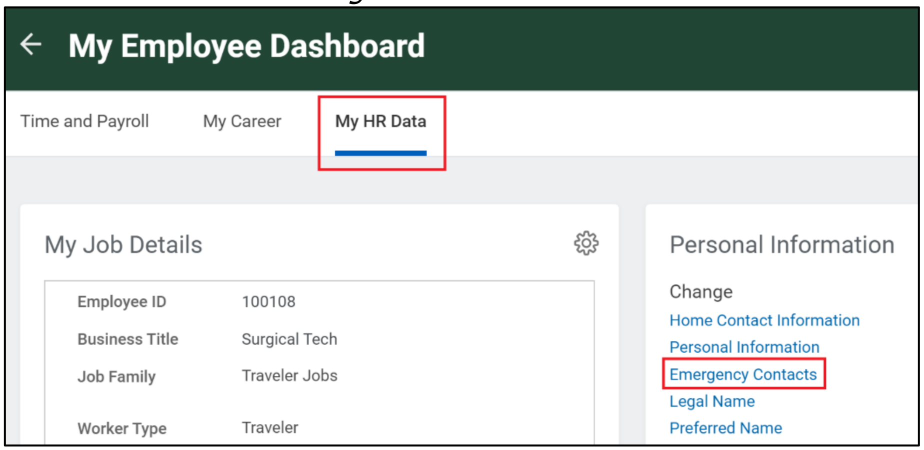
1) Go to *Your Top Apps* and select **My Employee Dashboard.**



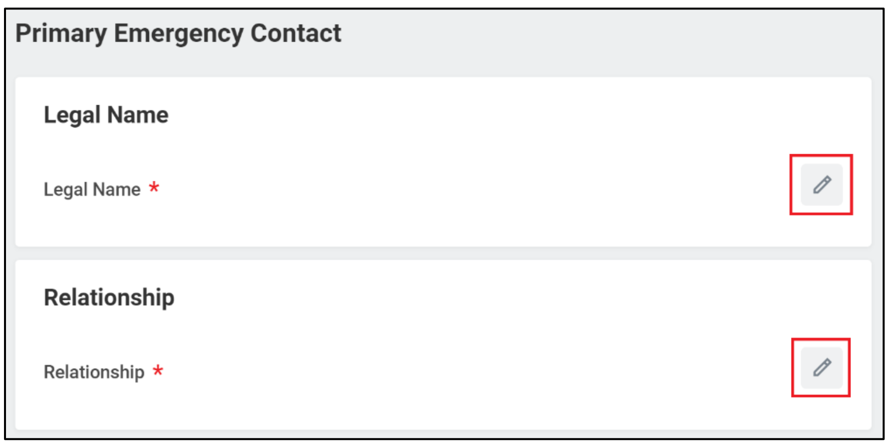
Note: You may also manually search for the employee dashboard or use the *Menu* drop-down to find the dashboard.

2) Click the **My HR Data** tab.

3) Find the *Personal Information* card and select **Emergency Contact** under *Change*.



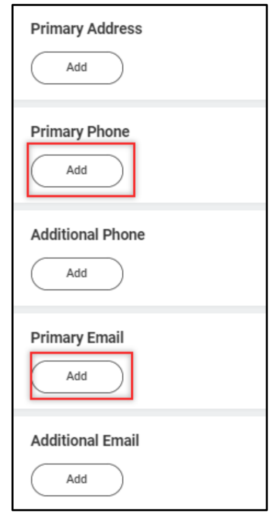
4) Click the **Edit** (pencil icon) to make changes to the required fields: *Legal Name* and *Relationship.*



5) When you are finished, click **Save** (check mark icon).

6) To add a Primary Address, or a Primary and/or Additional Phone number and email address, click **Add.**

Note: Primary emergency contacts must have at least one Primary Phone or Email Address. Fields marked by a red asterisk (*) are required.



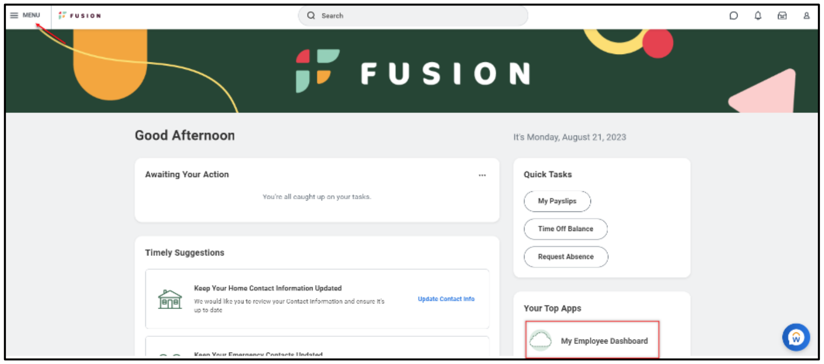
7) Click **Submit.**

Payroll

View/Print Payslip

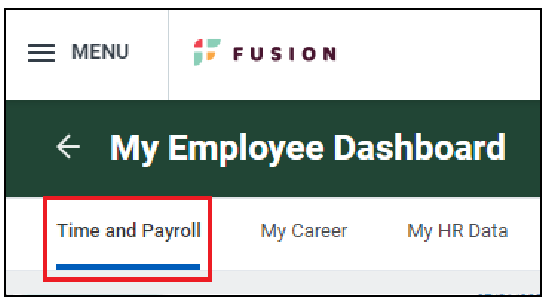
From the Home page:

1) Go to *Your Top Apps* and select **My Employee Dashboard.**

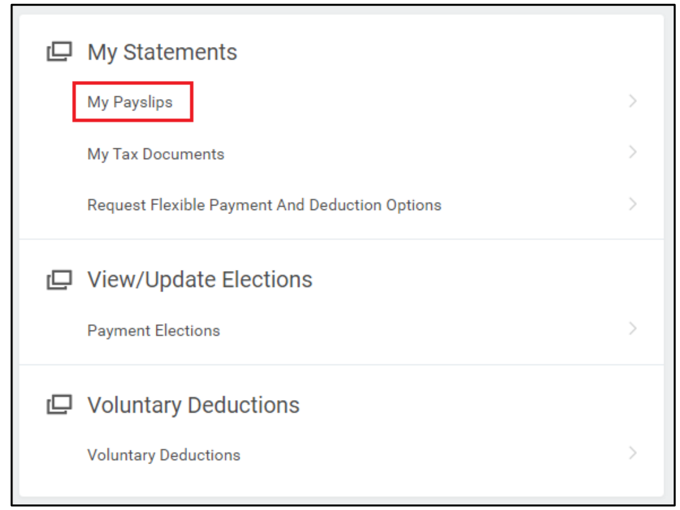


Note: You may also manually search for the employee dashboard or use the *Menu* drop-down to find the dashboard.

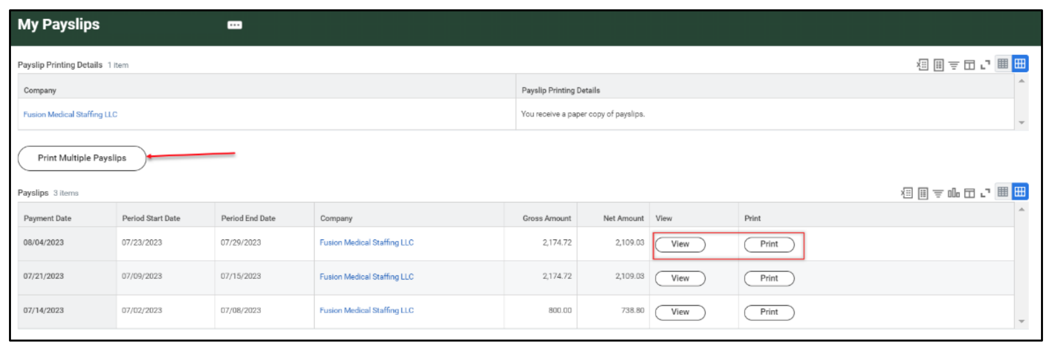
2) Click the **Time and Payroll** tab.



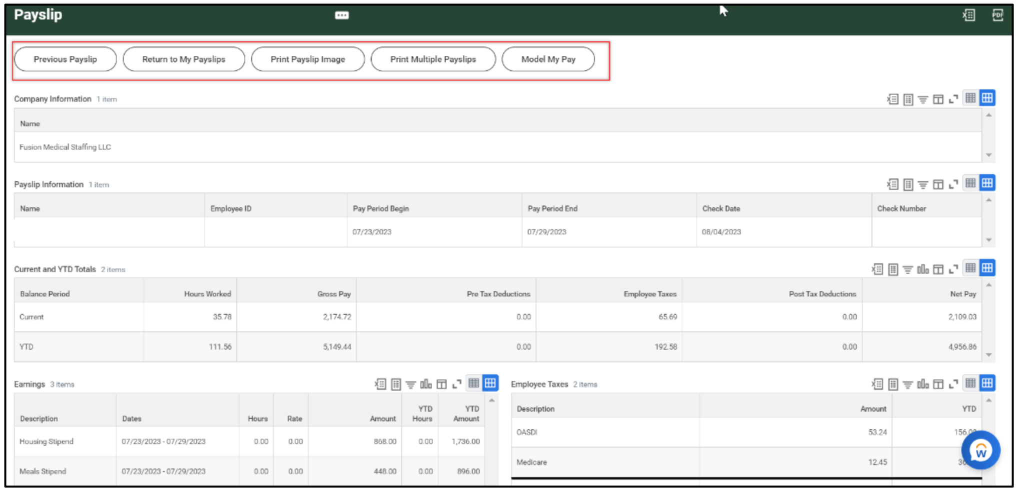
3) Find the *My Statements* card and select **My Payslips**.



4) Click **View** or **Print** on a single payslip. Or select **Print Multiple Payslips** to select multiple payments over a specific time period.



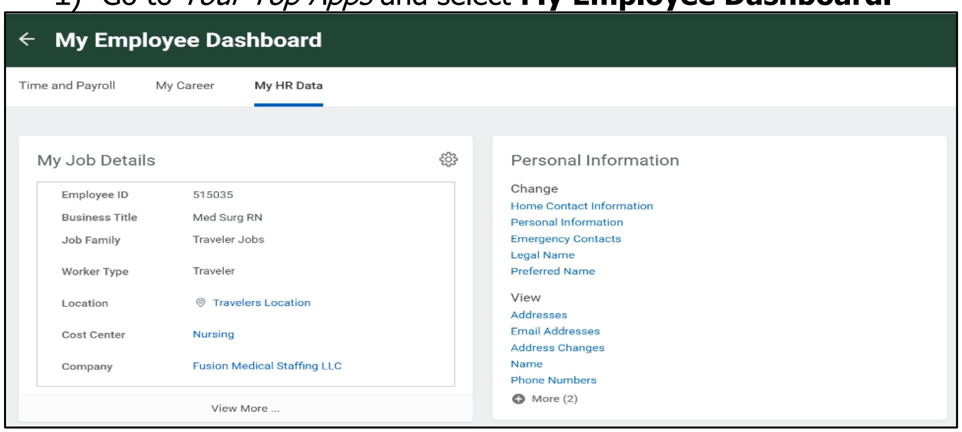
5) When you view your payslip, you can see a breakdown of your pay information and take additional action.



Manage Payment Elections

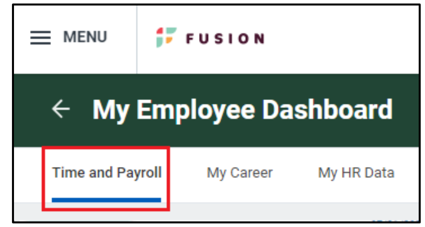
From the Home page:

1) Go to *Your Top Apps* and select **My Employee Dashboard.**

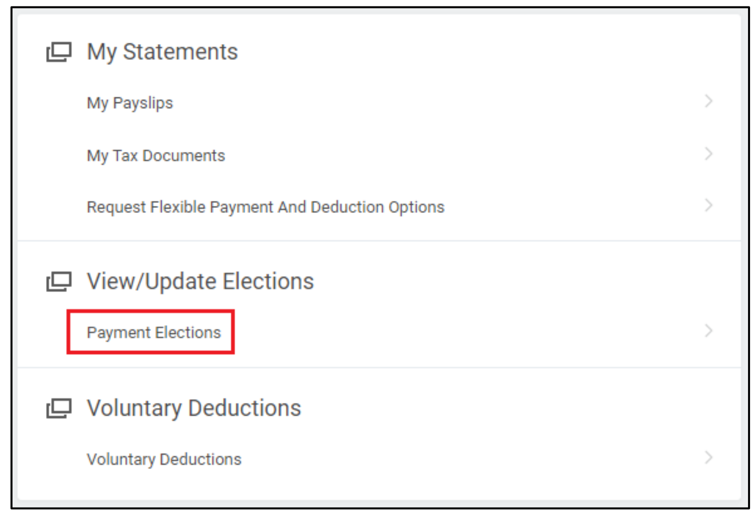


Note: You may also manually search for the employee dashboard or use the *Menu* drop-down to find the dashboard.

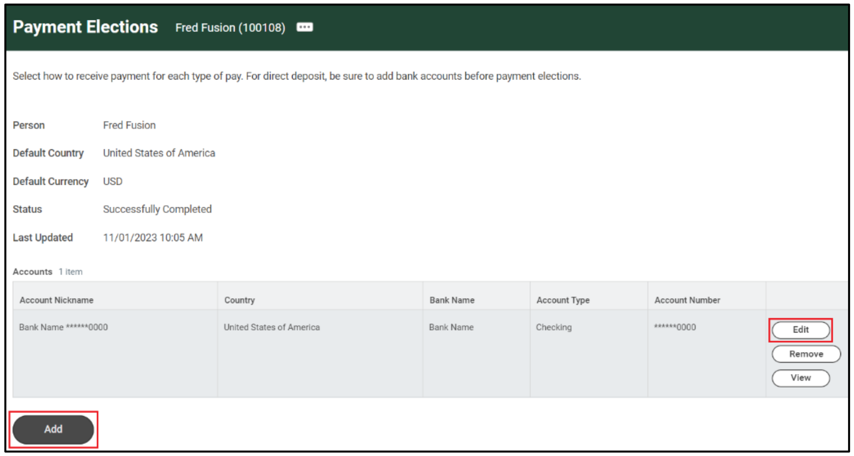
2) Click the **Time and Payroll** tab.



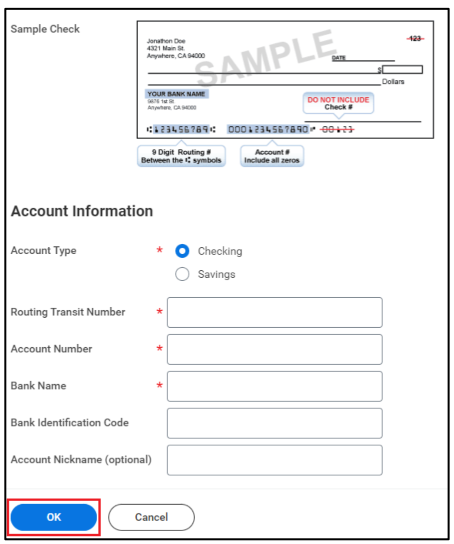
3) Find the *View/Update Elections* card and select **Payment Elections.**



4) Under *Accounts* select **Edit** to change an existing account or to add a new account select **Add**. Select **Remove** to delete an account.



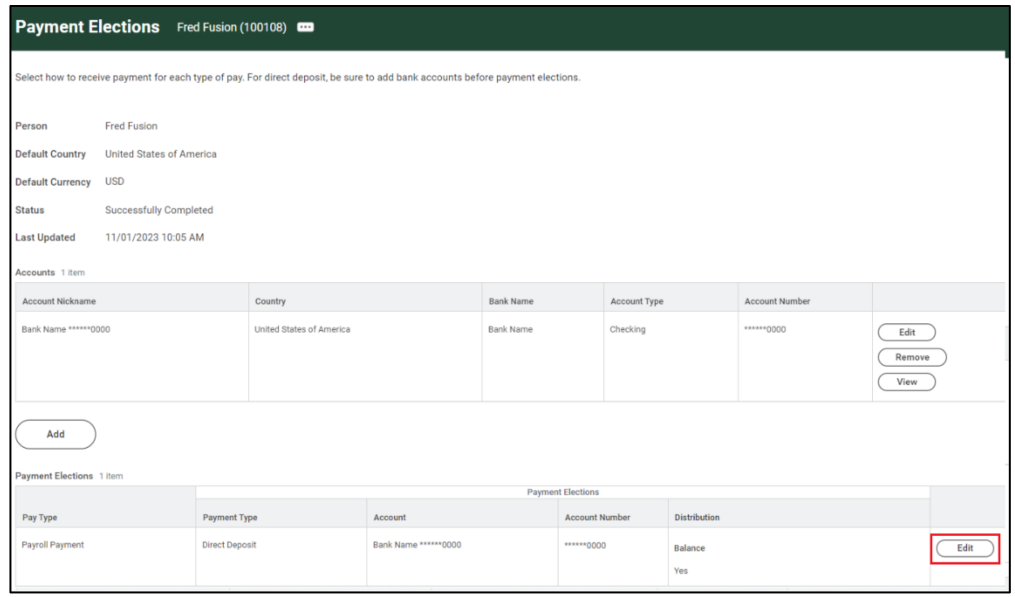
5) Enter or update the **Account Type**, **Routing Transit Number**, **Account Number**, and **Bank Name**. Ensure the information entered is correct and then click **OK**.



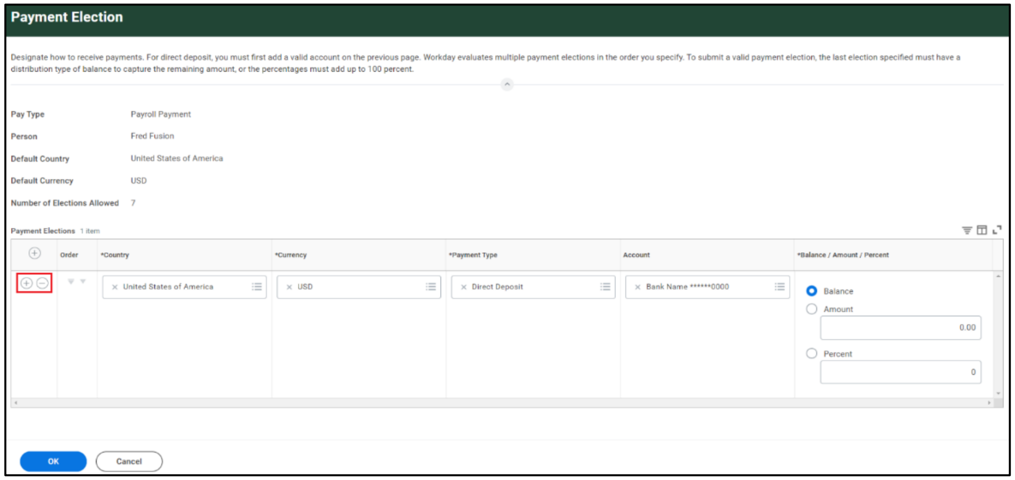
Note:

- For direct deposit, you must first set up accounts, refer to steps 1-5 to add account(s).
- For multiple elections, you must designate the order and distribution of payments. You can have up to 7 elections.
- To submit a valid payment election, the last election specified must have a distribution type of balance to capture the remaining amount, or the percentages must add up to 100 percent.

6) Under *Payment Elections* select **Edit** to manage payment distribution.

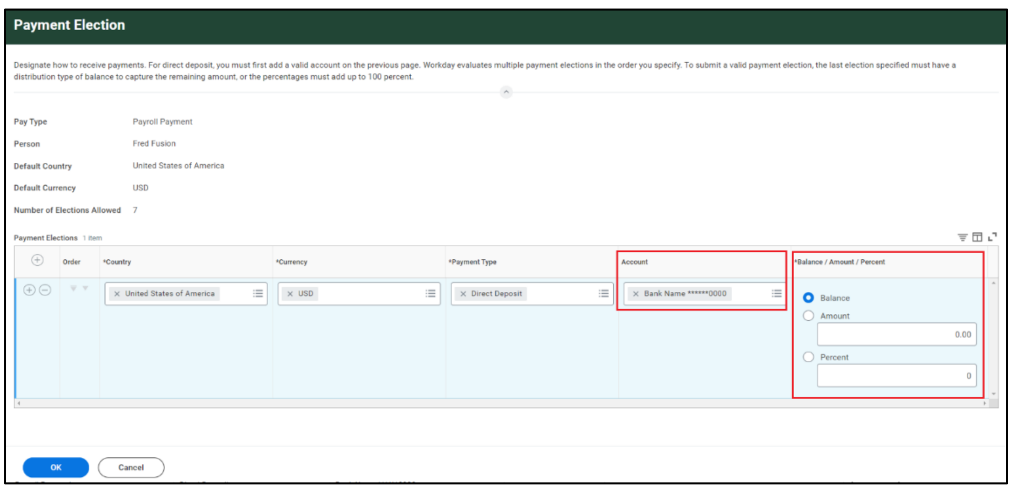


7) To add additional *Payment Elections*, select the **+** (plus sign). To remove an existing *Payment Election*, select the **–** (minus sign).



8) Enter or update the **Account** and **Balance**/**Amount**/**Percent**.

Note: The *Payment Election* can be the balance, a specific dollar amount or a desired percentage.

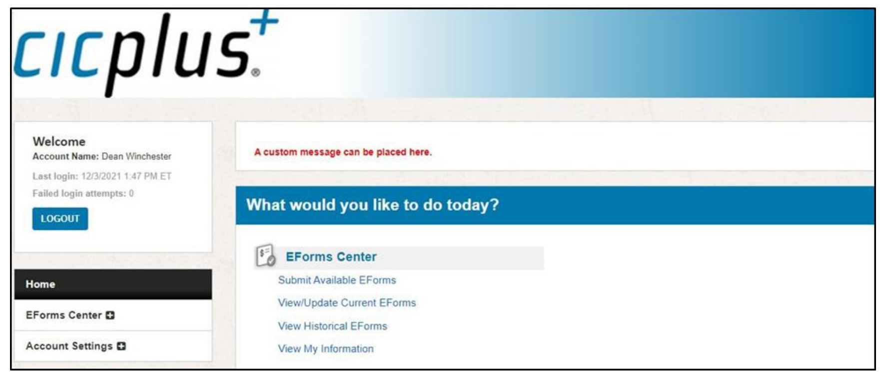


9) Click **OK**.

Note: Payment elections are effective the date they are entered into Workday. If they are entered by Wednesday at 10AM CST, they will be applied starting the Friday payday of that same week (2 days later). If entered after 10 AM CST on Wednesday, they will be applied the next week's payday (9 days later).

Update Tax Elections Through Experian

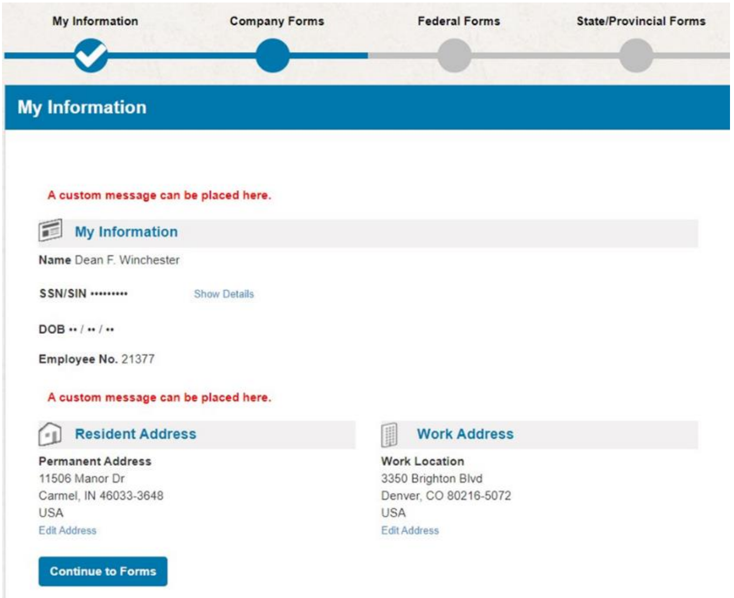
1) Home is the main page where you can view all options available such as ***Submit Available EForms***, ***View/Update Current EForms***, ***View Historical EForms***, or ***View My Information***. You will land on this page after account creation, an onboarding tool, or through SSO. Please use the ***EForms Center*** to work with EForms and begin to submit your tax withholding forms by clicking on ***Submit Available EForms.***



My Information Page

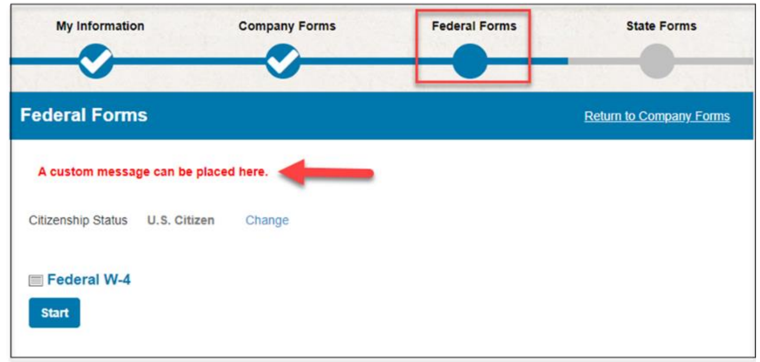
2) By clicking on ***Submit Available EForms***, you will be directed to the ***My Information Page***. Some integrations will take you directly to this page. You are required to review your personal information as well as your resident and work addresses to ensure all information presented is accurate. Forms are presented based on home and work

address. If any changes are needed, you will receive custom messaging to direct you on how to update your data.



Once you have verified all information is correct, click on the ***Continue to Forms*** button to move onto the next step.

3) You may be presented with prerequisite questions which will help determine which forms will be presented. Answer the question(s) then click on the ***Save*** button if necessary. You can review your answer to the prerequisite question(s) and change them if necessary by clicking on ***Change***. Click on the Start button and the Federal W-4 form will be presented for completion.



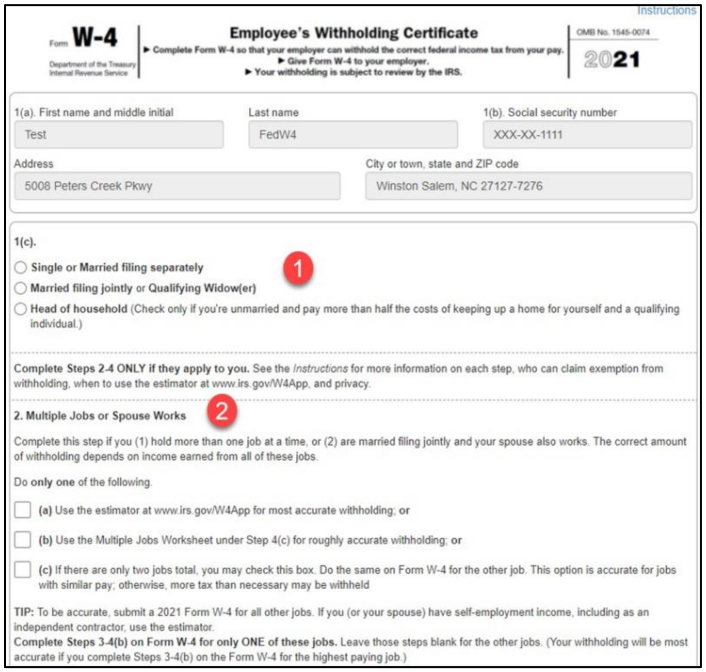
Federal Forms Page

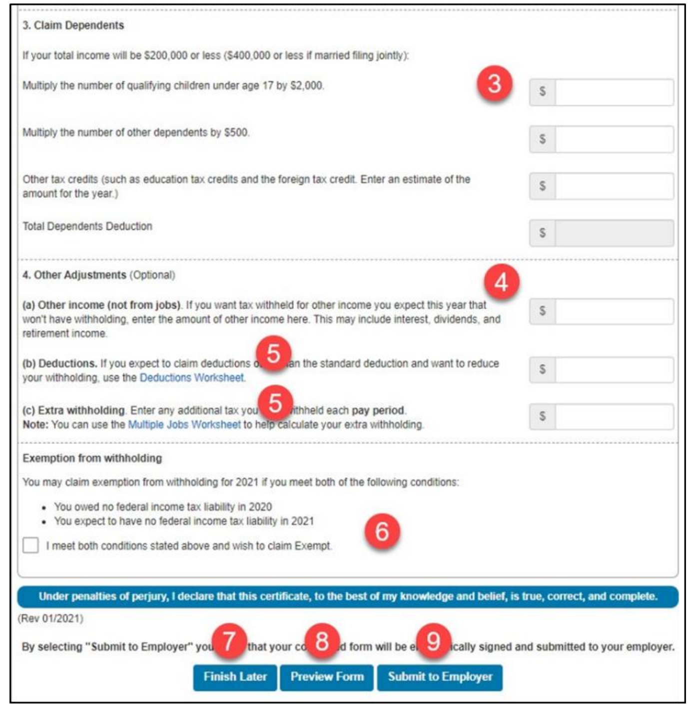
The following fields will be completed for the Federal form:

- You must select a status (***Single or Married filing separately***, or ***Married filing jointly or Qualifying Widow(er)*** or ***Head of household***
- You can check any box(es) that apply under the Multiple Jobs or Spouse works section.
- You can enter values under the Claim Dependents section.
- You can enter values under the Other Adjustments section.
- Worksheets are available if you would like to fill them out. Worksheets can help determine additional deductions and additional withholding due to multiple jobs.
- If you choose to be exempt from the Federal taxes, check the ***Exempt*** box.
- ***Finish Later*** – This allows you to exit and return to the

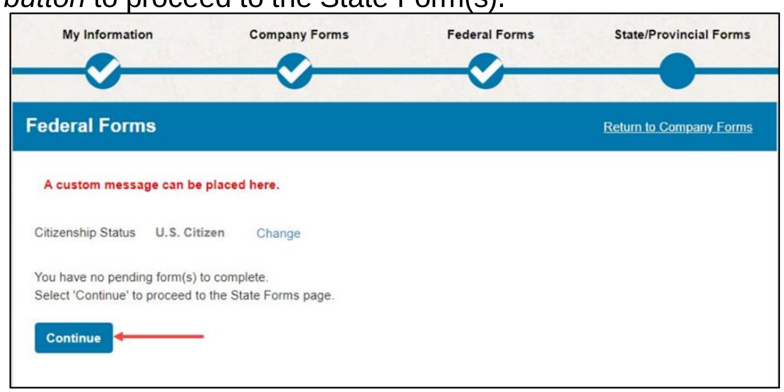
form later as necessary.

- ***Preview Form*** – This allows you to preview the Draft version in PDF format before submitting to your employer.
- ***Submit to Employer*** – Once the form has been completed, you will click on this button to electronically sign the form and it will be filed in your ***Current Forms***. Until you click on this button, the form will be considered a pending form.



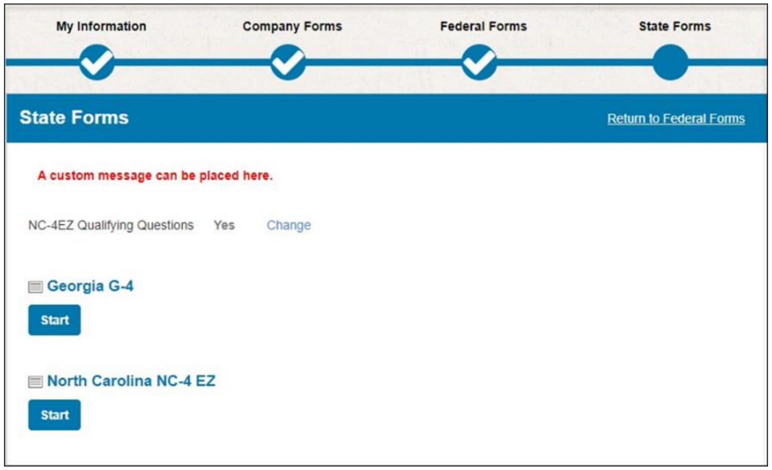


Once you have submitted your Federal form(s), you will get a checkmark at the top of the page showing completion. You will now need to click on the ***Continue*** *button* to proceed to the State Form(s).



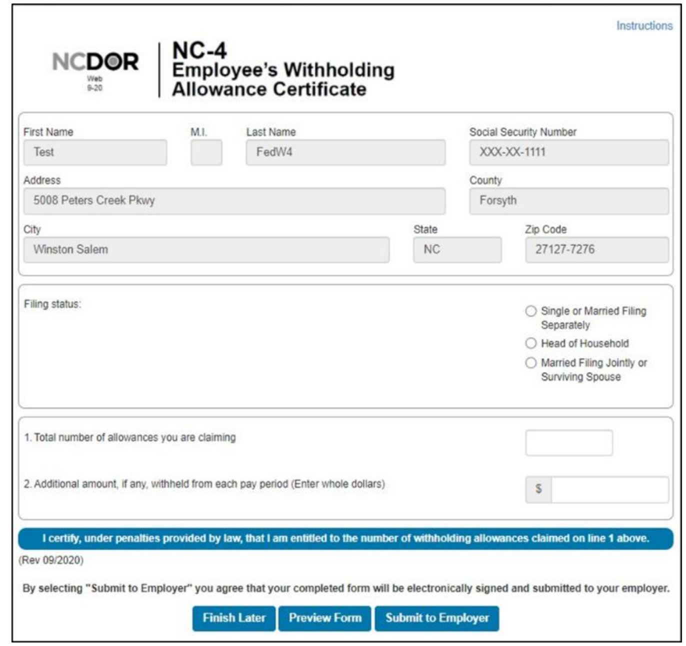
State Forms Page

In the next step, you will be presented with the appropriate State Form(s) based on your resident and work addresses.

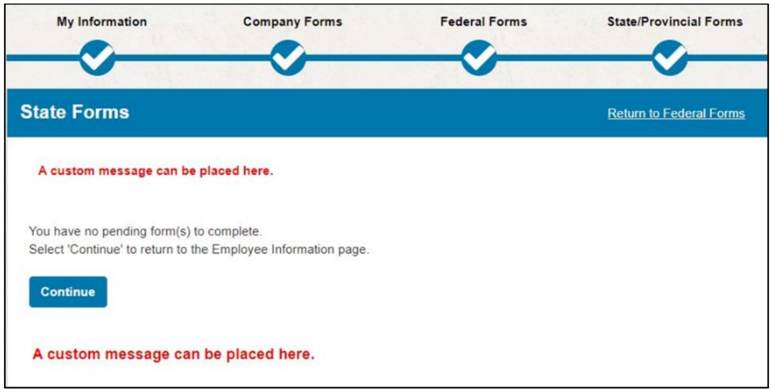


The following fields will be completed for the State form(s):

- You will complete the form to determine state withholdings.
- ***Finish Later*** – This allows you to exit and return to the form later as necessary.
- ***Preview Form*** – This allows you to preview the Draft version in PDF format before submitting to the employer.
- ***Submit to Employer*** – Once the form has been completed, you will click on this button to electronically sign the form and it will be filed in your ***Current Forms***. Until you click on this button, the form will be considered a pending form.

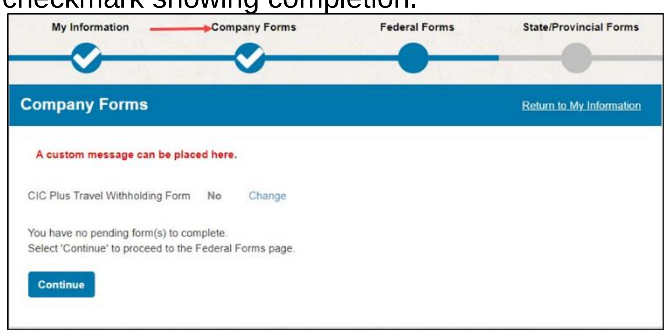


Once you have submitted your State form(s), you will get a checkmark at the top of the page showing completion. You will now need to click on the ***Continue*** button to proceed.



Company Forms Page

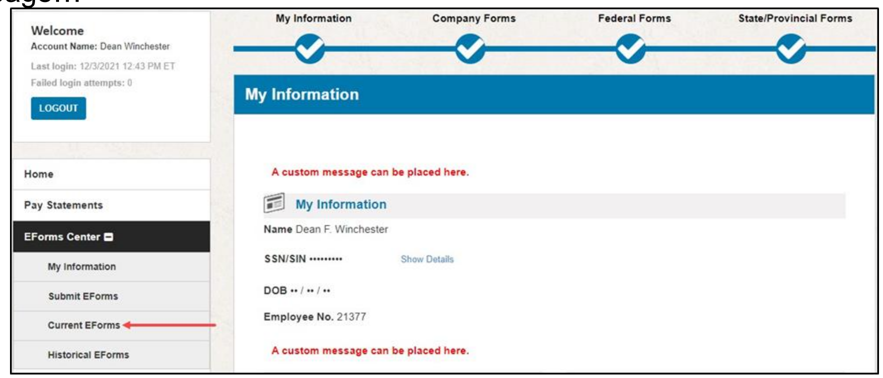
If your company has company specific forms, you will be required to complete those forms before you receive the ***You have no pending form(s) to complete*** message. The company forms can be placed before Federal Forms or after State Forms. There will be an additional position on the task bar at the top of the page. Once you have submitted your Company Forms, you will get a checkmark showing completion.



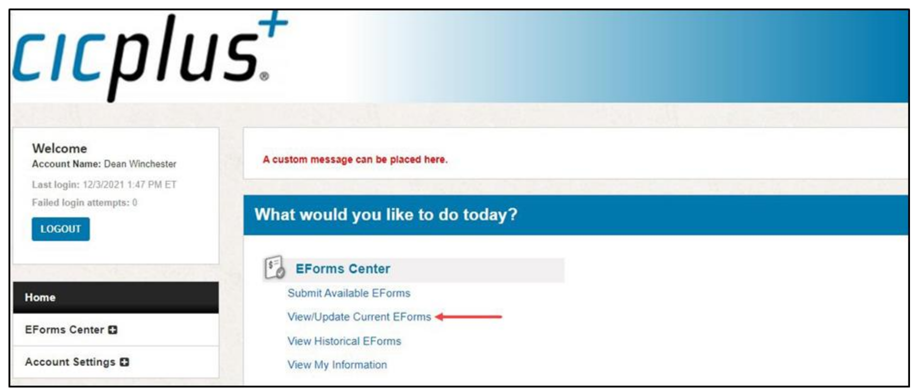
View/Update Current EForms

This function allows an employee to view or change his/her most recently completed and submitted forms. The ***Current EForms*** page will be displayed with all the current, active forms.

To access this feature, click on ***Current EForms*** on the left side of the page…



or click on ***View/Update Current Eforms*** on the ***Home Page***.

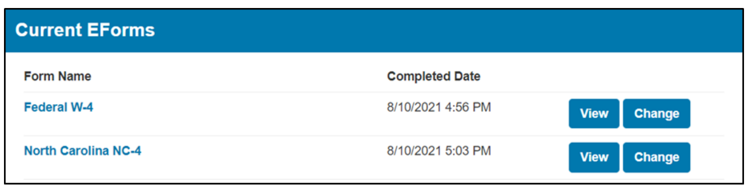


To review the most recently submitted form, click on the ***View*** button. A PDF copy of the form will be displayed. You can save or print PDF versions.

To update the most recently submitted forms, click on the ***Change*** button. This action prompts the system to archive a previously completed form and will direct you to complete a new copy of the form. You will be asked to confirm you are ready to update a new form and will be notified that your previous form will be archived/moved to Historical EForms.

IMPORTANT NOTES:

- Do NOT click on the ***Change*** button unless form withholding information needs to be updated.
- If the Federal W-4 form is changed, any State and/or Local forms previously completed (that rely on the information included in the Federal W-4) will also have to be resubmitted.


Current EForms

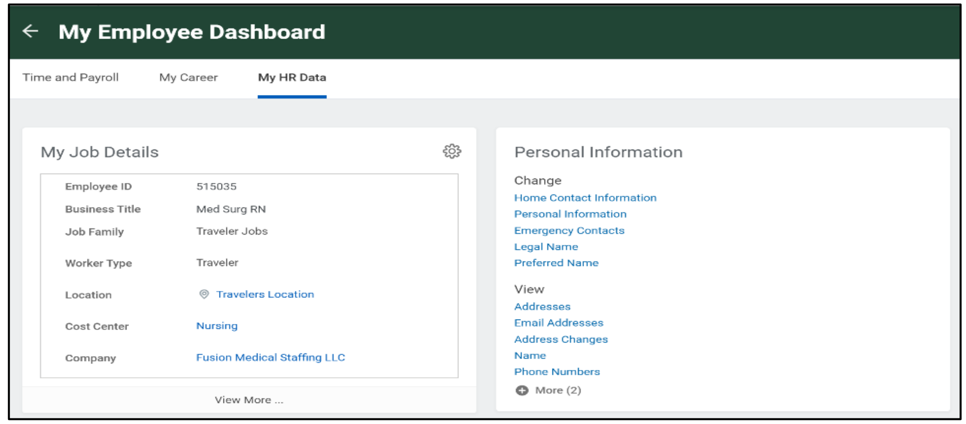
Form Name	Completed Date	
Federal W-4	8/10/2021 4:56 PM	View Change
North Carolina NC-4	8/10/2021 5:03 PM	View Change

Update Tax Elections (No Address Change)

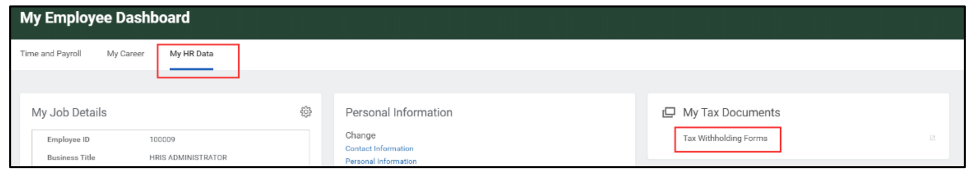
Tax elections are managed through Experian. Workday will link you directly to Experian to complete your tax elections.

From the Home page:

1) Go to *Your Top Apps* and select **My Employee Dashboard.**



Withholding Forms.

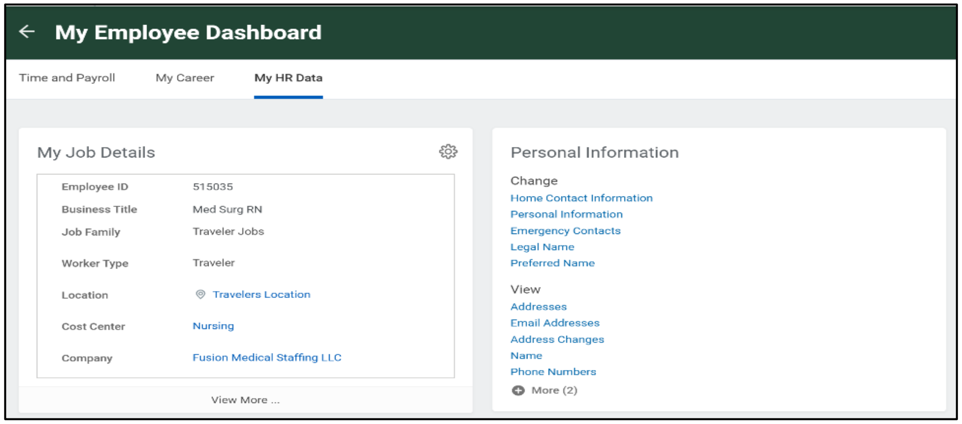


4) This will link you to the Experian dashboard where you can update tax elections.

Update Tax Elections (Address Change)

From the Home page:

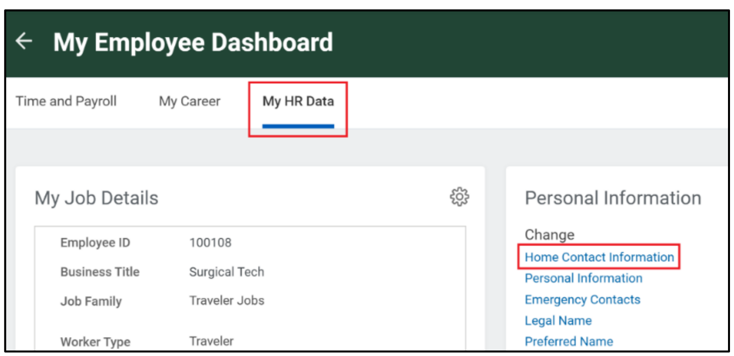
1) Go to *Your Top Apps* and select **My Employee Dashboard.**



Note: You may also manually search for the employee dashboard or use the *Menu* drop-down to find the dashboard.

2) Click the **My HR Data** tab.

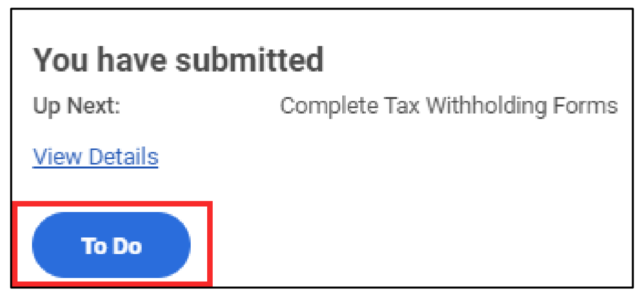
3) Find the *Personal Information* card and select **Home Contact Information** under *Change*.



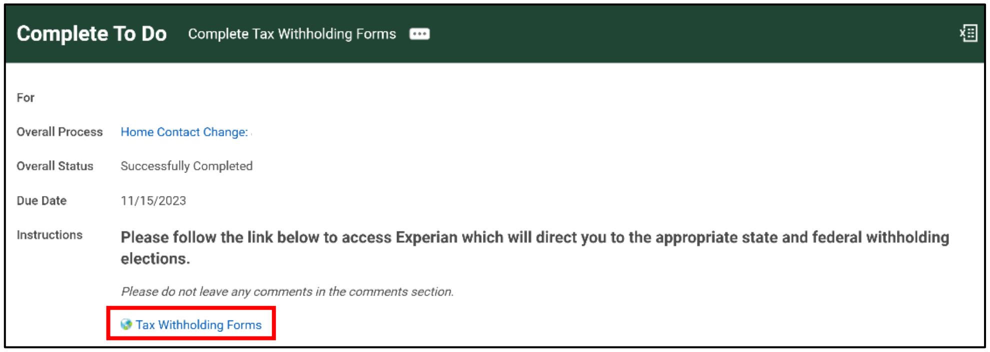
4) Select the **Edit** (pencil icon) and update your home address.

5) A pop-up will appear to confirm your submission, click **To Do**.

Note: You can also find this task in your Workday Inbox.



6) Click the Experian link under the instructions.



7) Follow the steps on the Experian website to update your tax elections.

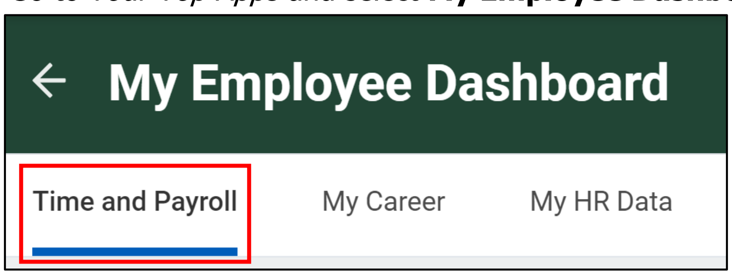
8) After completing your Tax Withholding Forms return to the task in your Workday Inbox and click **Submit**.

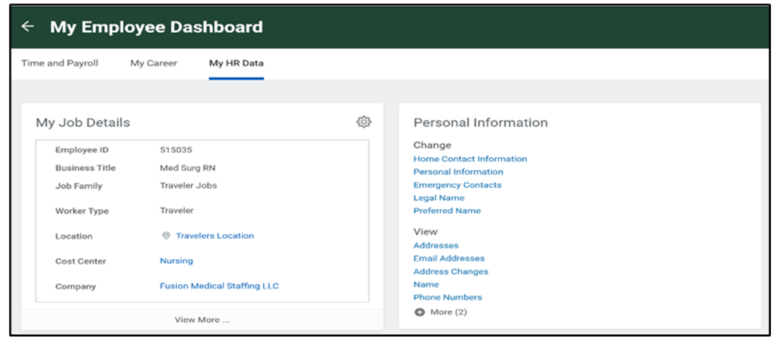
Note: Tax Withholdings are effective the date they are entered into Workday. If they are entered by Wednesday at 10AM CST, they will be applied starting the Friday payday of that same week (2 days later). If entered after 10 AM CST on Wednesday, they will be applied the next week's payday (9 days later).

View W-2

From the Home page:

1) Go to *Your Top Apps* and select **My Employee Dashboard.**

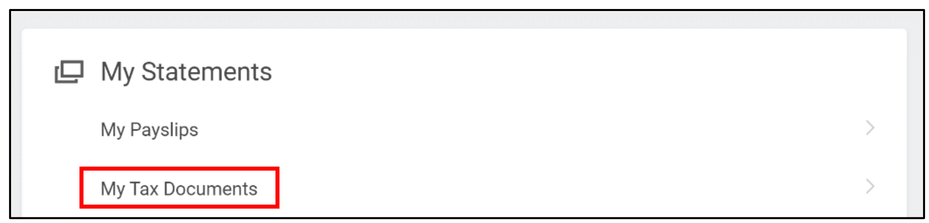




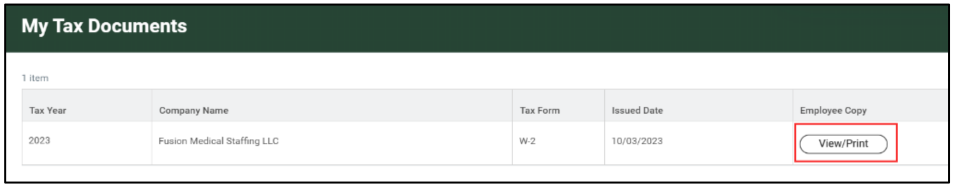
Note: You may also manually search for the employee dashboard or use the *Menu* drop-down to find the dashboard.

2) Click the **Time and Payroll** tab.

3) Find the *My Statements* card and select **My Tax Documents** to view your W-2 statement.



4) Click **View/Print** for a copy of your W-2 document.



My Tax Documents

1 item

Tax Year	Company Name	Tax Form	Issued Date	Employee Copy
2023	Fusion Medical Staffing LLC	W-2	10/03/2023	View/Print

Note: 2024 will be the first year of W-2s available in Workday.

Benefits

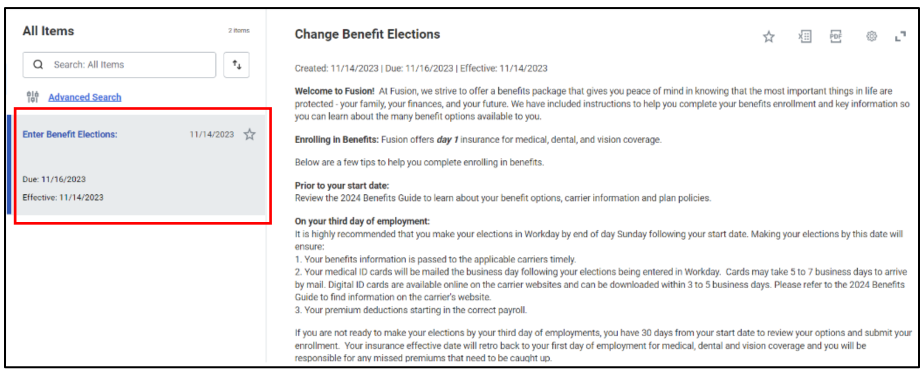
If you have questions, please contact the Benefits Team at benefits@fusionmedstaff.com.

Enroll/Change Benefits

New Hire Enrollment: Opportunity to enroll in benefits at the time of joining Fusion.

1) Select **Inbox (My Tasks)**.

2) Find the *Change Benefit Elections* task.



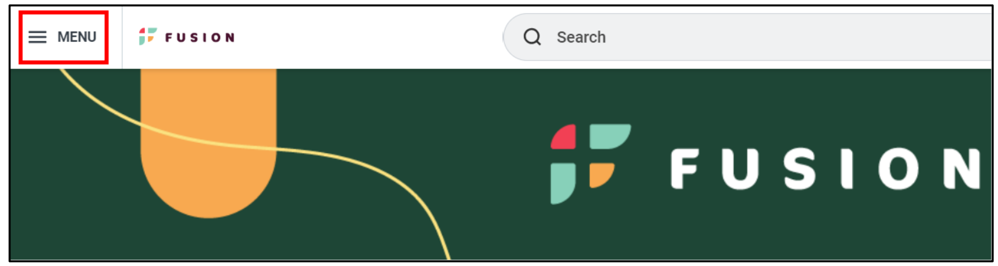
3) Review the instructions and click **Let's Get Started**. Now skip to step 12.

Qualified Life Event: Allows you the opportunity to change your benefit elections outside of open enrollment.

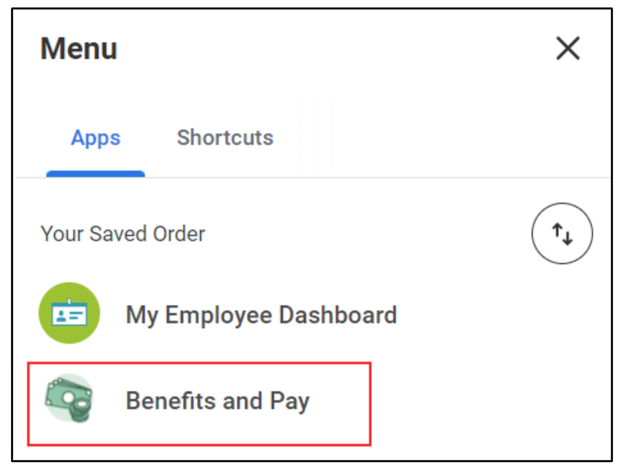
Note: If you are making changes to dependents due to a Qualifying Life Event, you must first add/edit dependent(s). Skip to page 18.

From the Home page:

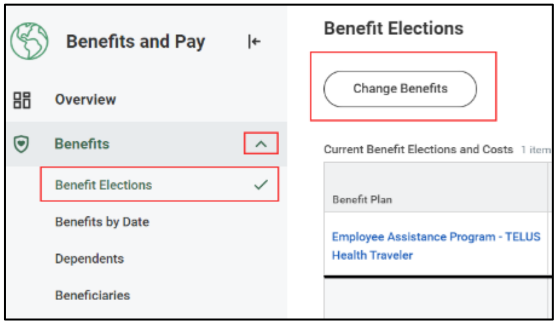
1) Click **Menu**.



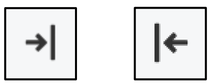
2) Select the **Benefits and Pay** app.



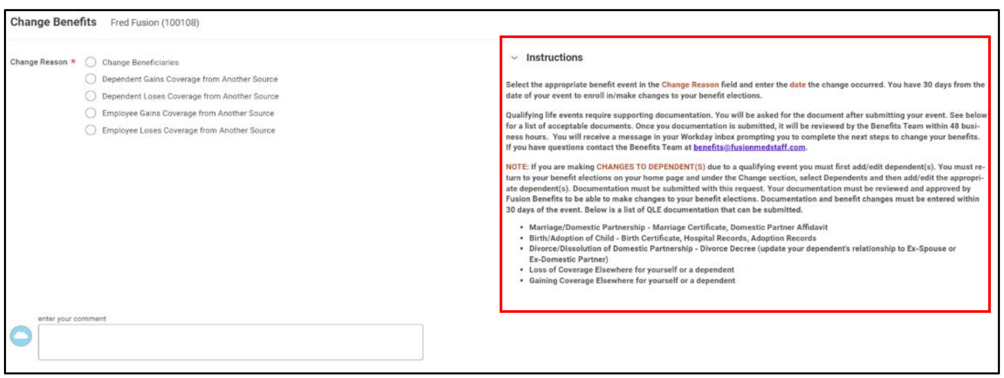
3) Select **Change Benefits** on the *Overview* tab. Or click the *Benefits* tab, then click *Benefit Elections* and select **Change Benefits**.



Note: Expand and collapse this menu by clicking the arrow with the line.



4) From the *Change Benefits* page, review the **Instructions** to assist with making your selections.

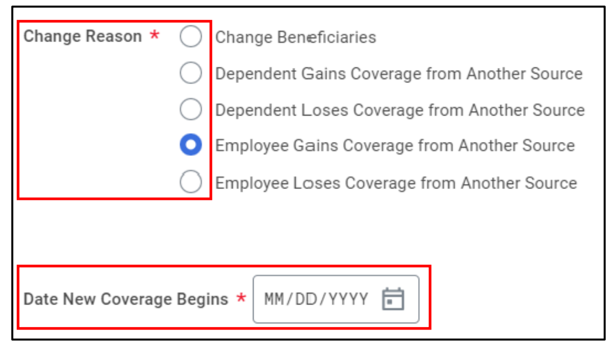


5) Select the appropriate **Change Reason**.

Note: You have 30 days from the date of your event to enroll in or make changes to your benefit elections.

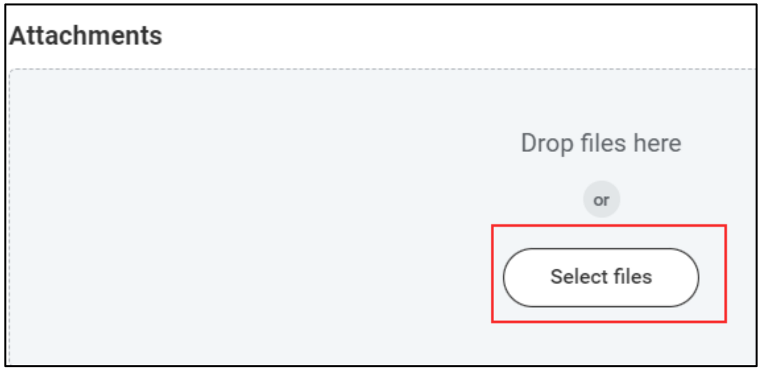
- Change Beneficiaries
- Dependent Gains Coverage from Another Source
- Dependent Loses Coverage from Another Source
- Employee Gains Coverage from Another Source
- Employee Loses Coverage from Another Source

6) Depending on the *Change Reason* selected, enter the appropriate **Date** for the benefit change.



7) The **Submit Elections By** and **Benefits Offered** section will automatically populate.

8) If needed, provide the appropriate attachments by dropping the file in the grey box or click **Select Files** and upload from your device.



Note: For Qualifying Life Events, supporting documentation is required within 30 days of the event. Once your documentation is submitted, it will be reviewed by the Benefits Team within 48 business hours. You will receive a message in your Workday inbox prompting you to complete the next steps to change your benefits.

Below is a list of Qualifying Life Event documentation that can be submitted:

- Marriage/Domestic Partnership - Marriage Certificate, Domestic Partner Affidavit
- Birth/Adoption of Child - Birth Certificate, Hospital Records, Adoption Records
- Divorce/Dissolution of Domestic Partnership - Divorce Decree (update your dependent's relationship to Ex-Spouse or Ex-Domestic Partner)
- Loss of Coverage Elsewhere for yourself or a dependent
- Gaining Coverage Elsewhere for yourself or a dependent

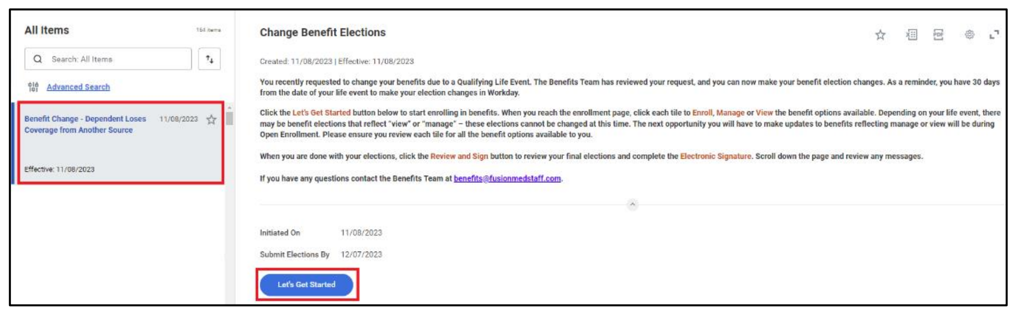
9) Click **Submit.**

Up Next: The benefits change will route for review. This may take up to 48 hours for the Benefits Team to process the request. Once the processed, you must log into Workday to finish the change benefit event.

10) Once your change has been approved, login to Workday and select the **Inbox (My Tasks)**.

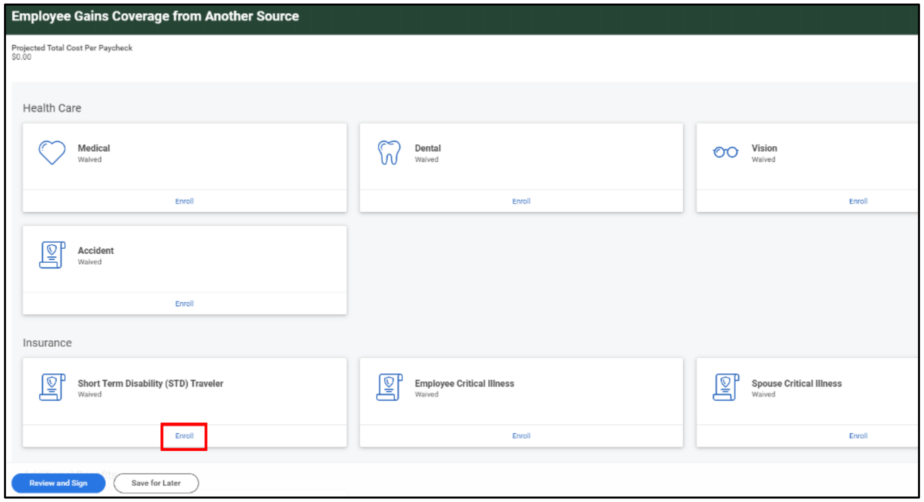
Note: You will have 30 days to make your election changes.

11) Find the **Change Benefit Elections** task and click the **Let's Get Started**.

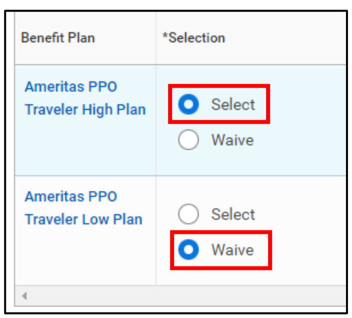


12) Review benefit coverage options available for *Health Care*, *Insurance*, and *Additional Benefits*. Click **Enroll**, **Manage** or **View** on each benefit tile.

Note: For Qualifying Life Events, there may be benefit elections that reflect **View** or **Manage** – these elections cannot be changed at this time. The next opportunity you will have to make updates to these benefits will be during Open Enrollment. Please ensure you review each tile for all the benefit options available to you.



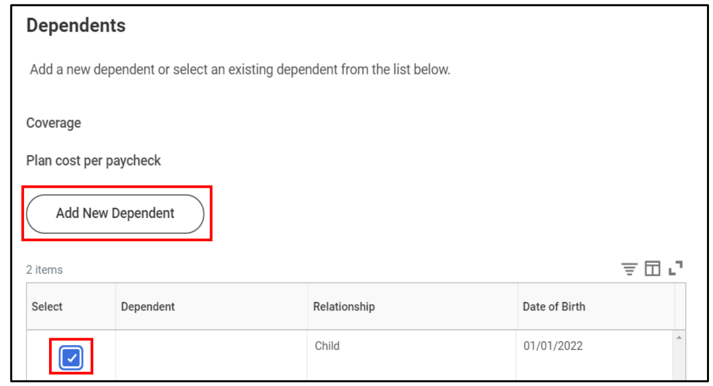
13) For the available plans listed, read the *General Instructions* and select either **Select** or **Waive** coverage.



14) Click **Confirm and Continue**.

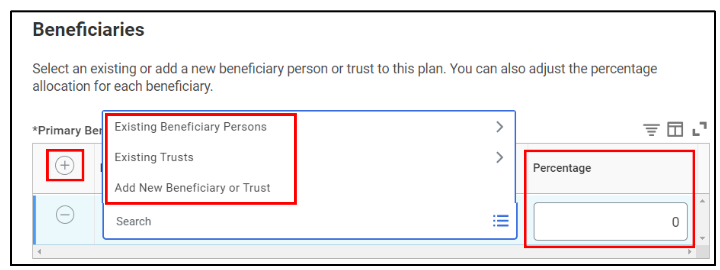
15) Optionally, on available benefits, click **Add New Dependent** to create a new record or **check** the box next to an existing dependent record. Also, scroll down to enter each dependent's Social Security Number (SSN) or a reason if the SSN is not available.

Note: If you are adding a new dependent, legal name, relationship, date of birth, gender, and address are required.



16) For benefits associated with beneficiaries, click **+** (plus sign) to add a single beneficiary or multiple beneficiaries. Select an **Existing Beneficiary Persons**, **Existing Trusts**, or **Add New Beneficiary or Trust**. Enter a **Percentage** allocation for each beneficiary.

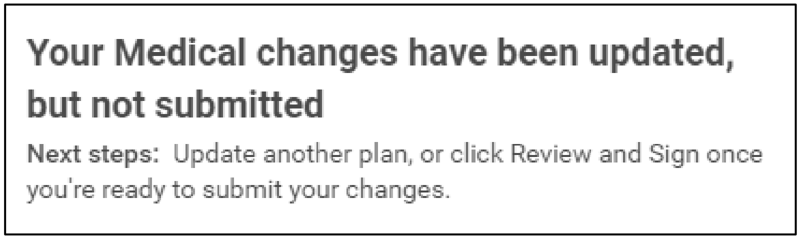
Note: Optionally add *Secondary Beneficiaries*.



17) Click **Save** to confirm your selection.

18) A pop-up will appear regarding the update, continue to review, and manage your elections.

Note: Changes available are based on the type of life event.

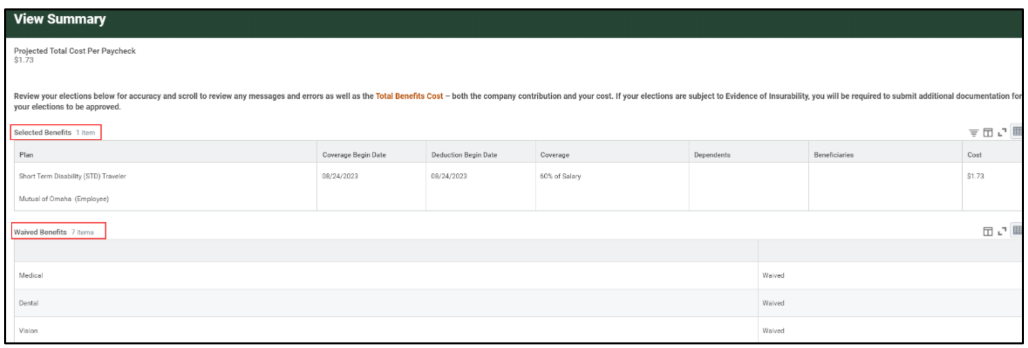


19) After reviewing and saving all your changes, finalize your benefit elections by selecting **Review and Sign.**

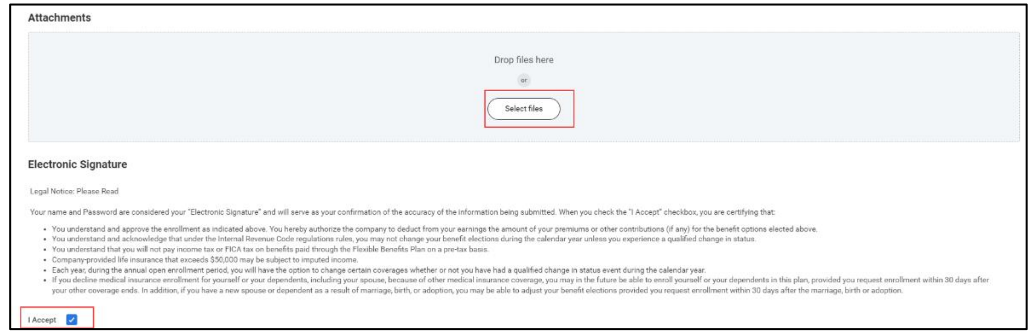
Note: Click **Save for Later** to keep your changes in your Workday Inbox to review and submit later.

20) Review the *Summary* to ensure your benefit selections are correct.

Note: If you find an error, click **Cancel** to go back and make changes.

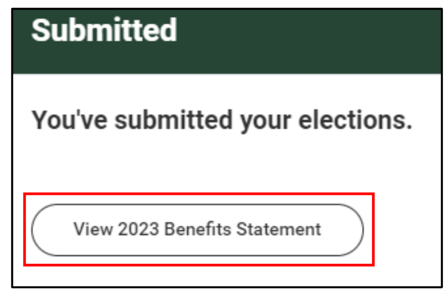


21) Scroll down to the bottom of the page to attach any required documents and read the **Legal Notice**. Click the **I Accept** checkbox after reviewing.



22) Click **Submit**.

23) After submission, you can view your statement by selecting **View *Year* Benefits Statement**.

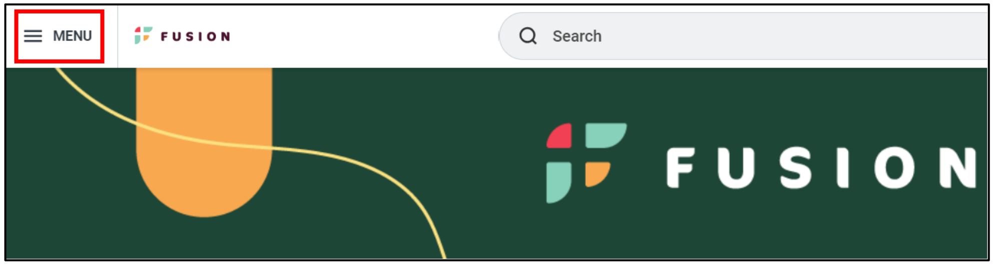


24) Click **Print** to create a PDF of your benefit elections for your records.

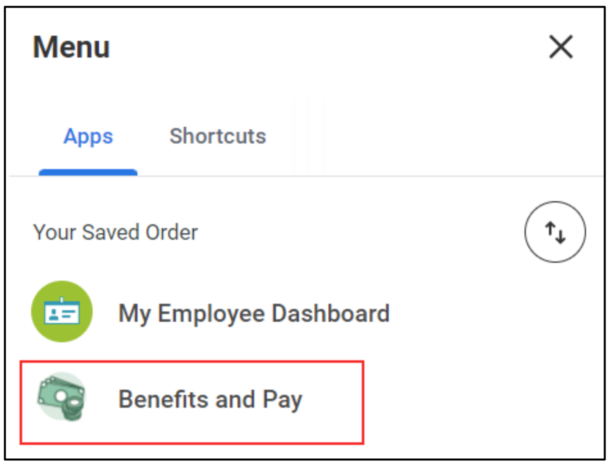
Add Dependents

From the Home page:

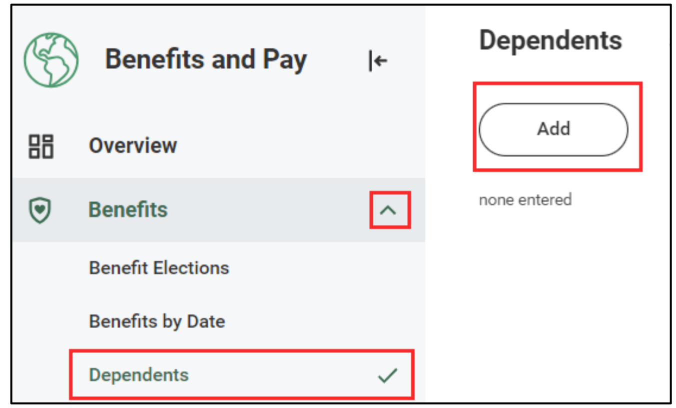
1) Click **Menu**.



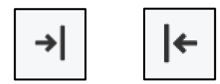
2) Select the **Benefits and Pay** app.



3) Click the *Benefits* tab, then click *Dependents* and select **Add**.

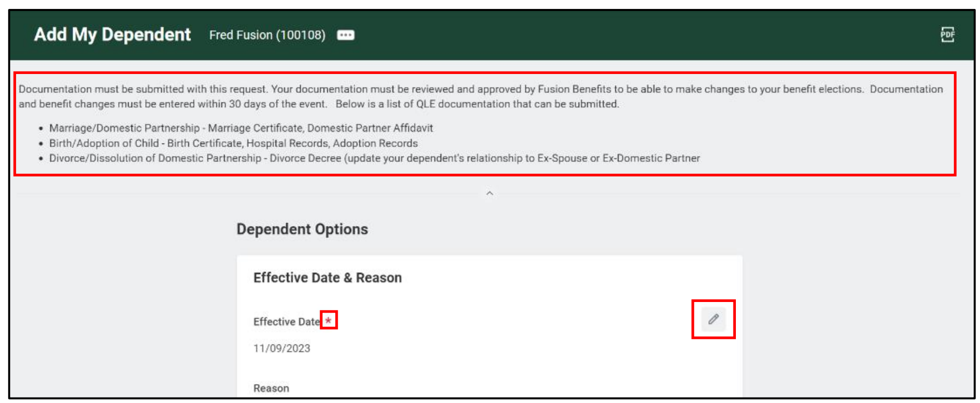


Note: Expand and collapse this menu by clicking the arrow with the line.



4) Review the instructional text for documentation requirements. Then click the **Edit** (pencil icon) to make edits to the fields.

Note: Fields marked with a red asterisk (*) are required.



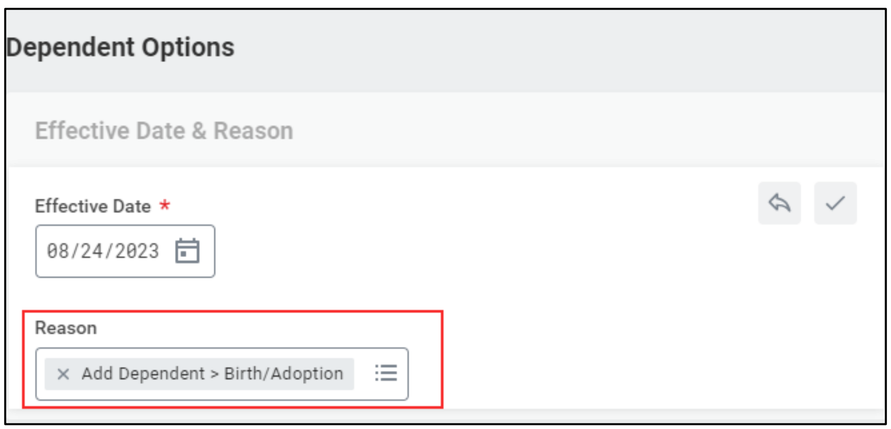
Note: If you have existing beneficiaries or emergency contacts in Workday, the **Is your new dependent already a beneficiary or emergency contact?** field will display. If this applies, select their record here.

5) The **Effective Date** will populate with today's date.

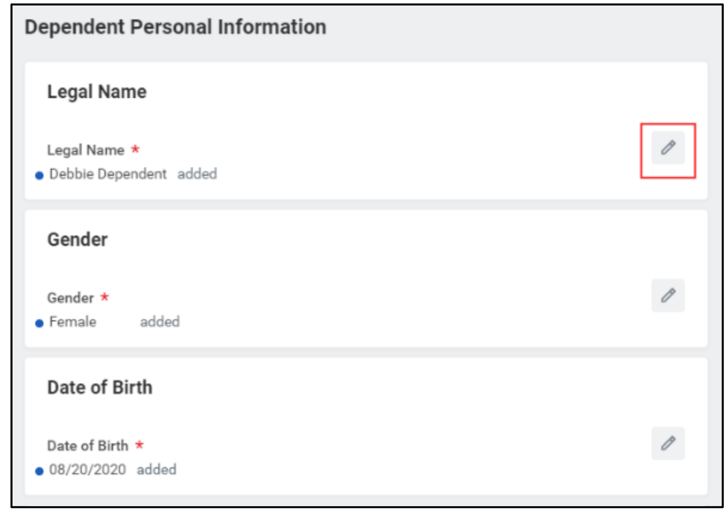
Note: The effective date can be no longer than 30 days in the past and cannot be in the future.

6) Select a **Reason**.
   - **Add Dependent**
     - Birth/Adoption
     - Marriage/Domestic Partnership
     - Other

Note: If the **Reason** is a qualified life event, Workday will initiate a *Change Benefit* event. Navigate to your Workday Inbox to complete.



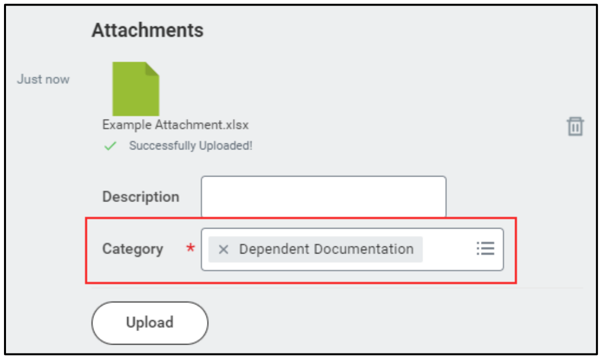
7) Enter the dependent's **Legal Name**, **Gender**, **Date of Birth**, **Relationship**, and any other additional information.



8) Optionally, provide any *Contact Information* or *Identifier Information* by selecting **Add**.

9) Provide the appropriate attachment by dropping the file in the grey box or click **Select Files** and upload from your device.
   - Marriage/Domestic Partnership - Marriage Certificate, Domestic Partner Affidavit
   - Birth/Adoption of Child - Birth Certificate, Hospital Records, Adoption Records

10) For *Category*, select **Dependent Documentation** or **Court Order Documentation**.



11) Once complete, select **Submit**.

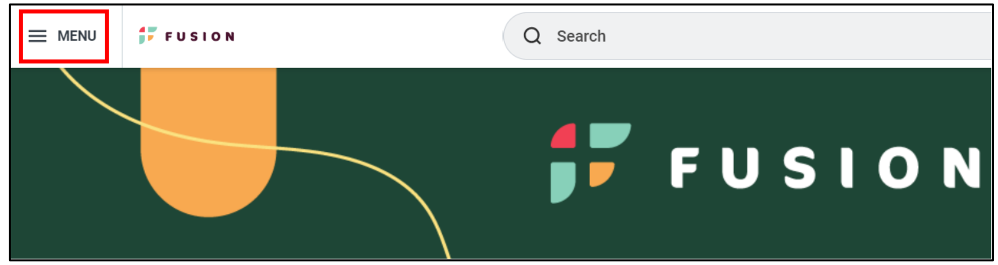
Up Next: The dependent add will route for review. This may take up to 48 hours for the Benefits Team to process the request. Once processed, you must log into Workday to submit the benefit change request.

Review Update Benefit Coverage for Dependent on page 22.

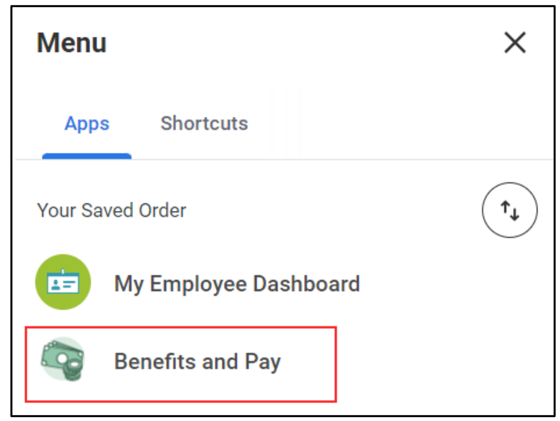
Edit or Delete Dependents

From the Home page:

1) Click **Menu**.

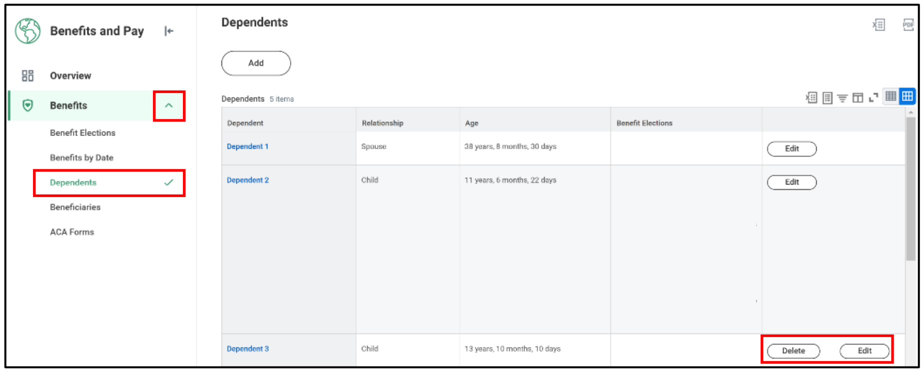


2) Select the **Benefits and Pay** app.



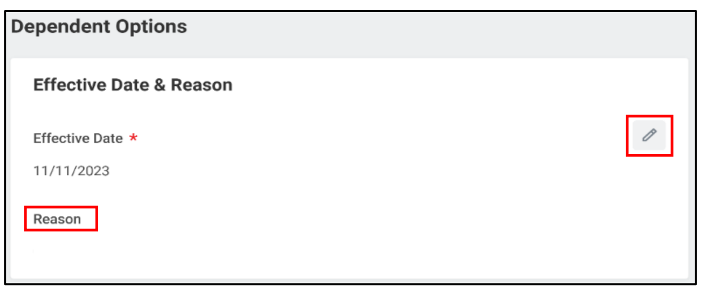
3) Click the *Benefits* tab, then click *Dependents.* Select **Edit** or **Delete**.

***Note:* Delete** is only an option if the dependent does not have a current or historical benefit.

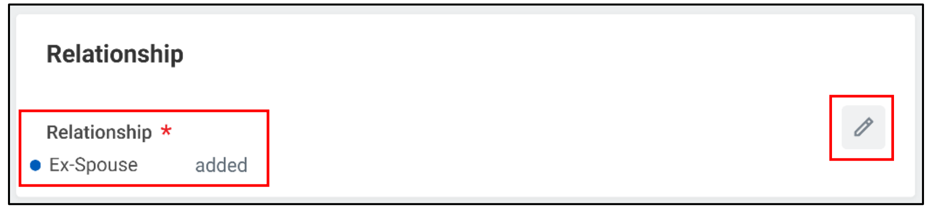


4) The **Effective Date** will populate with today's date.

5) Click the **Edit** (pencil icon) and select the **Reason**.
- **Change Dependent**
  - Correct Information
  - Divorce/Dissolution of Domestic Partnership *(In the Relationship field, please select Ex- Domestic Partner or Ex- Spouse)*
  - Other



6) Click the **Edit** (pencil icon) to make changes to desired fields, any changes will be noted.



Note: For *Divorce/Dissolution of Domestic Partnership*, you must attach a divorce decree. Use the **Dependent Documentation** or **Court Order Documentation** for *Category*.

7) Click **Submit**.

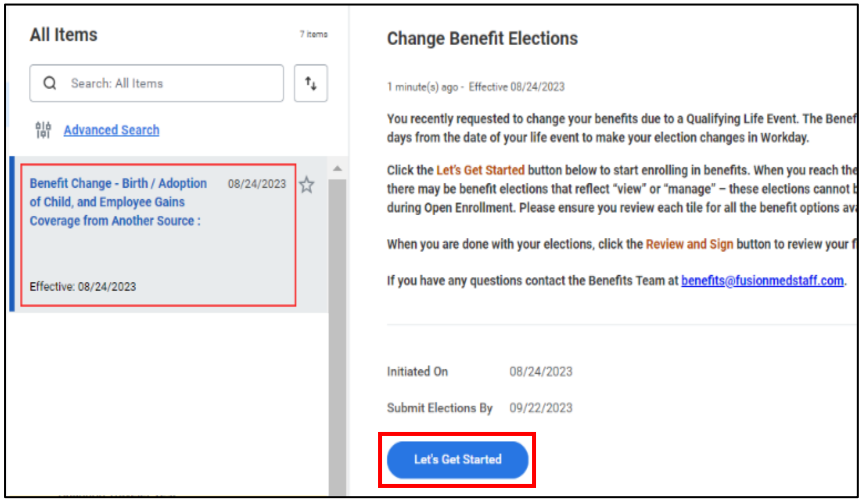
Note*:* This edits their record, you must process a Change Benefit event to update elections for the dependent.

*Up Next: If you selected **Change Dependent > Divorce/Dissolution of Domestic Partnership** as the reason for the dependent change, it will route for review. This may take up to 48 hours for the Benefits Team to process the request. Once processed, you must log into Workday to submit the benefit change request.*

Continue to Update Benefit Coverage for Dependent on the next page.

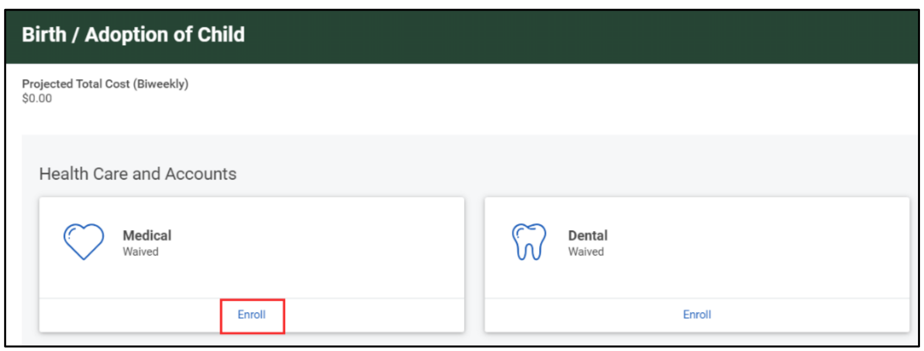
Update Benefit Coverage for Dependent

1) To complete the dependent benefit event, navigate to your *Workday Inbox* and find the **Change Benefit Elections** event.



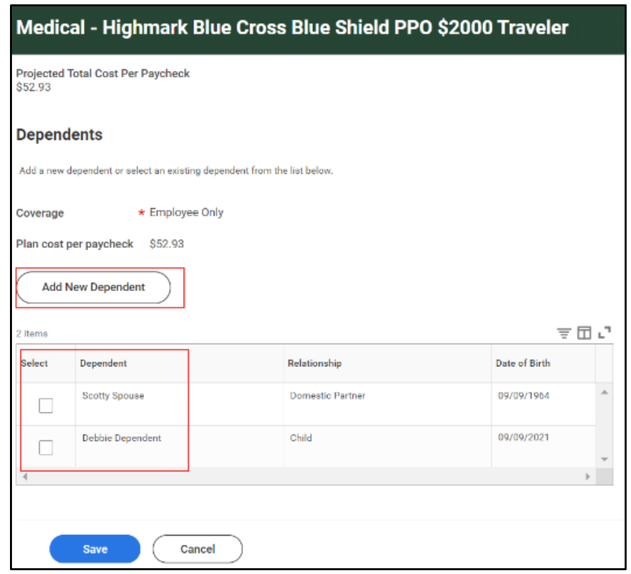
2) Read the instructions and click **Let's Get Started.**

3) Review each benefit tile and click **Enroll**, **Manage** or **View** on each.



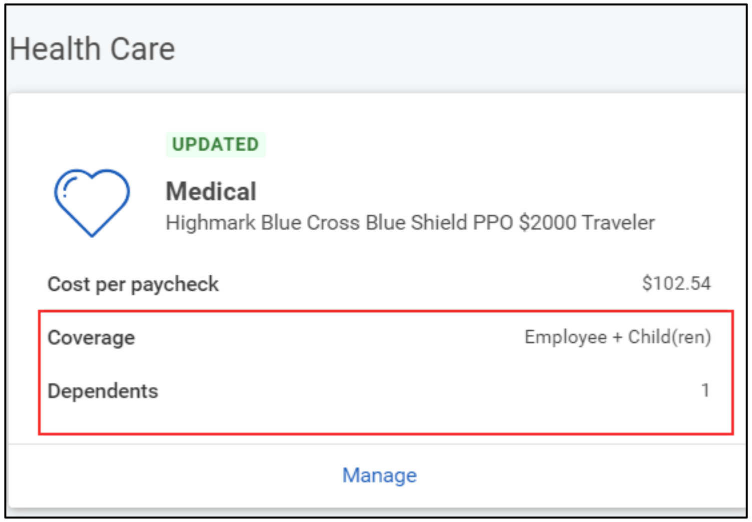
Note: Depending on your life event, there may be benefit elections that reflect **View** or **Manage** – these elections cannot be changed at this time. The next opportunity you will have to make updates to these benefits will be during Open Enrollment. Please ensure you review each tile for all the benefit options available to you.

4) Select **Add New Dependent** to create a new dependent to enroll to your benefits or select the **checkbox(s)** next to the existing dependents.



5) Click **Save**.

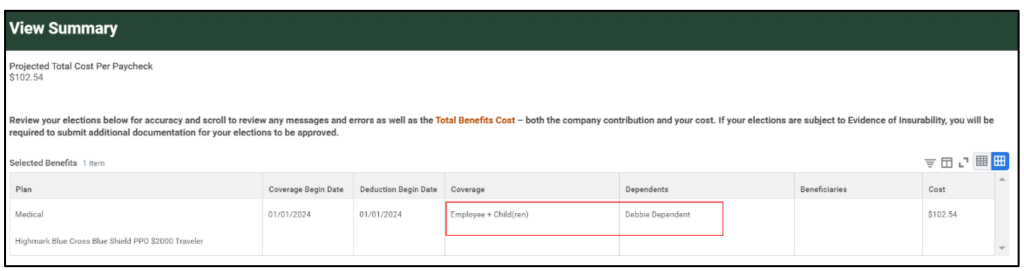
6) The benefit plan will now show coverage for your dependent(s).



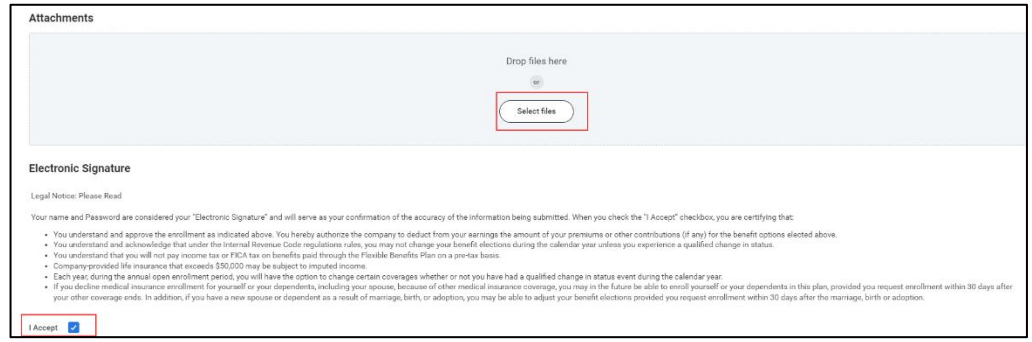
7) Continue enrolling your dependent(s) into the desired plans and click **Review and Sign** to finalize your changes.

8) Review the *Summary* to ensure your benefit elections are correct.

Note: If you find an error, click **Cancel** to go back and make changes

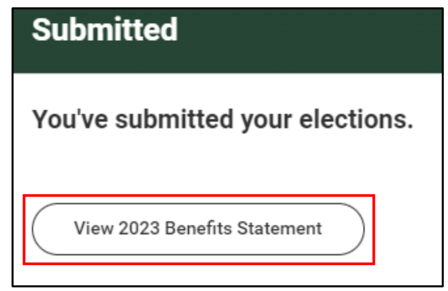


9) Scroll down to the bottom of the page to attach any required documents and read the **Legal Notice**. Click the **I Accept** checkbox after reviewing.



10) Click **Submit.**

11) After submission, you can view your statement by selecting **View *Year* Benefits Statement**.

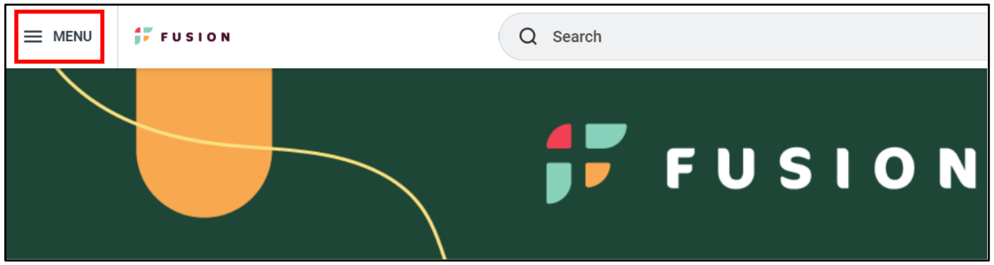


12) Click **Print** to create a PDF of your benefit elections for your records.

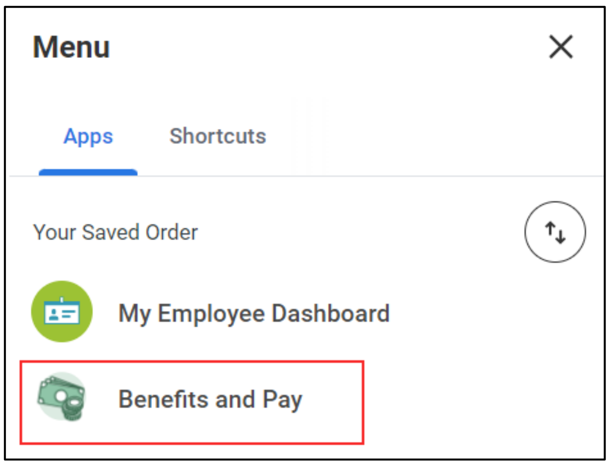
Add Beneficiaries

From the Home page:

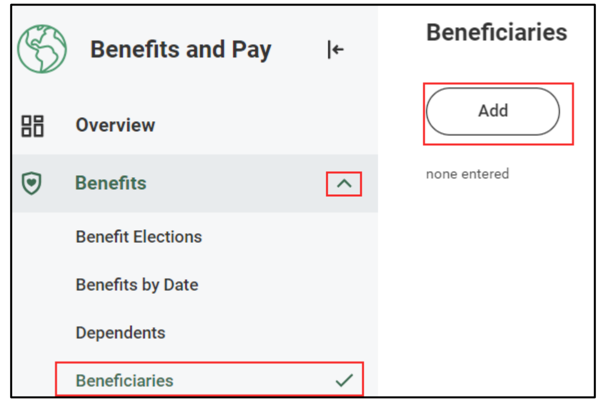
1) Click **Menu**.



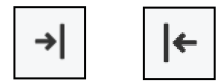
2) Select the **Benefits and Pay** app.



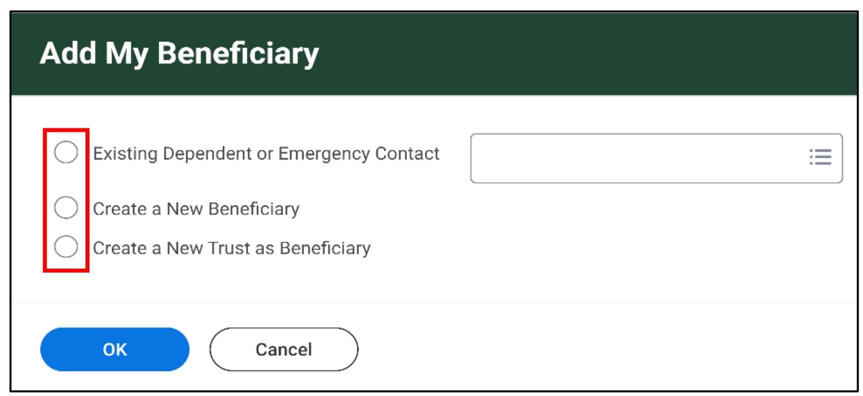
3) Click the *Benefits* tab, then click *Beneficiaries* and select **Add**.



Note: Expand and collapse this menu by clicking the arrow with the line.



4) Select the desired action.
   - **Existing Dependent or Emergency Contact** (Use an existing dependent or emergency contact record)
   - **Create a New Beneficiary**
   - **Create a New Trust as Beneficiary**

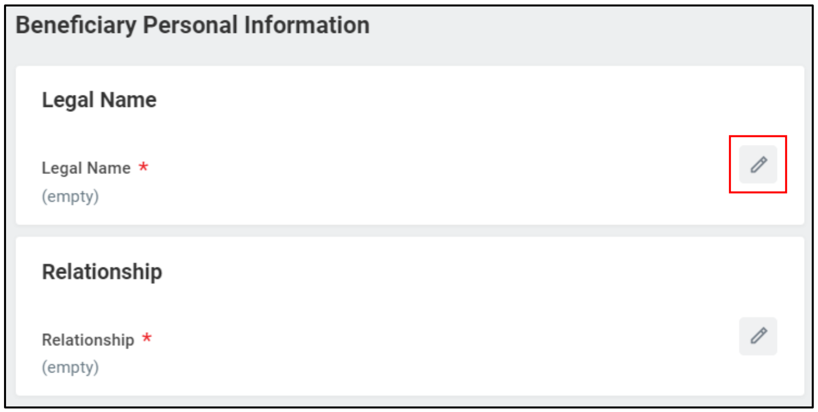


5) Click **OK.**

6) Click the **Edit** (pencil icon) to make edits to the fields.

Note: Fields marked with a red asterisk (*) are required.

7) Enter the **Legal Name**, **Relationship**, and **Primary Address** of the beneficiary.



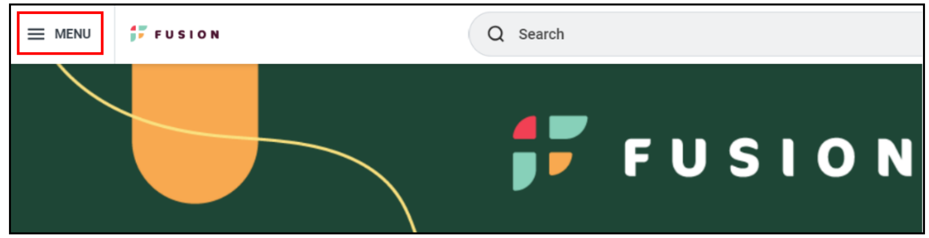
8) Click **Submit**.

Note: This will not add a beneficiary to your existing insurance elections, it only creates their record. You must process a Change Benefit event to update beneficiaries on your existing insurance elections.

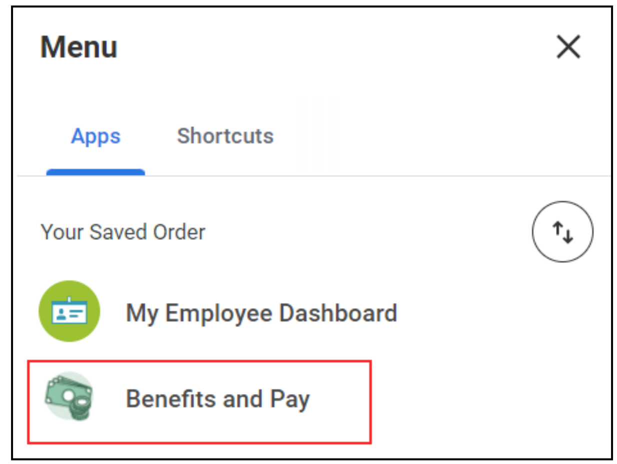
Change Beneficiaries on Benefit Elections

From the Home page:

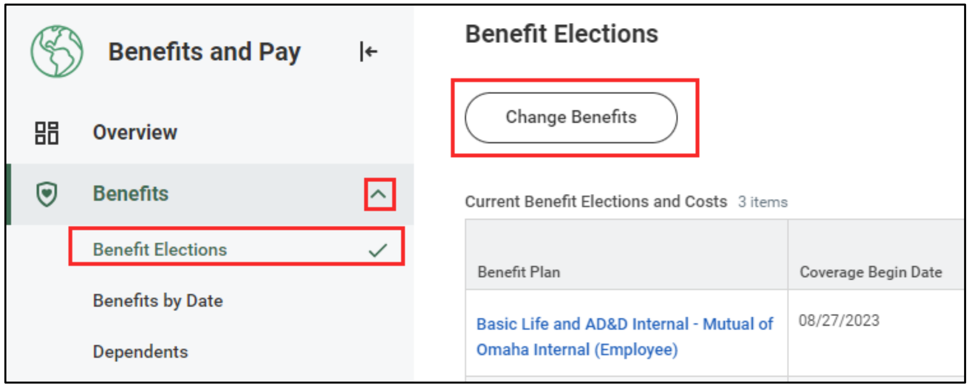
1) Click **Menu**.



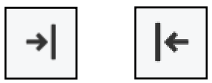
2) Select the **Benefits and Pay** app.



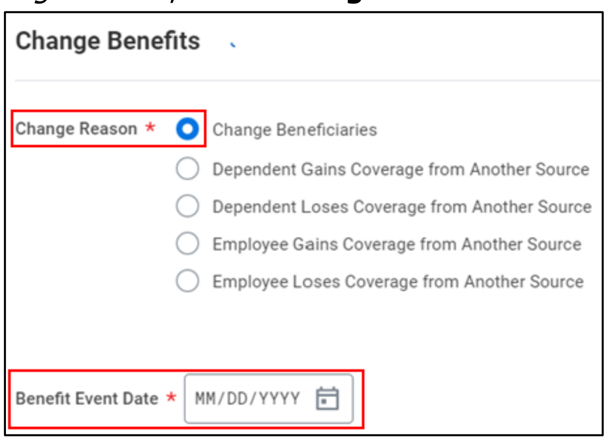
3) Select **Change Benefits** on the *Overview* tab. Or click the *Benefits* tab, then click *Benefit Elections* and select **Change Benefits**.



Note: Expand and collapse this menu by clicking the arrow with the line.

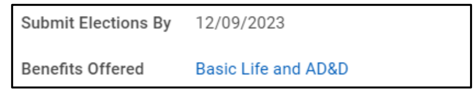


4) For *Change Reason*, select **Change Beneficiaries**.



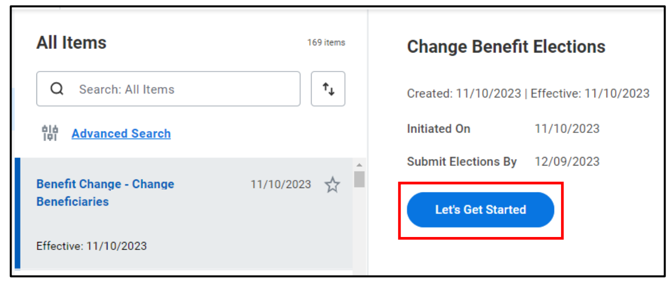
5) Enter the **Benefit Event Date**.

6) The **Submit Elections By** and **Benefits Offered** section will automatically populate.

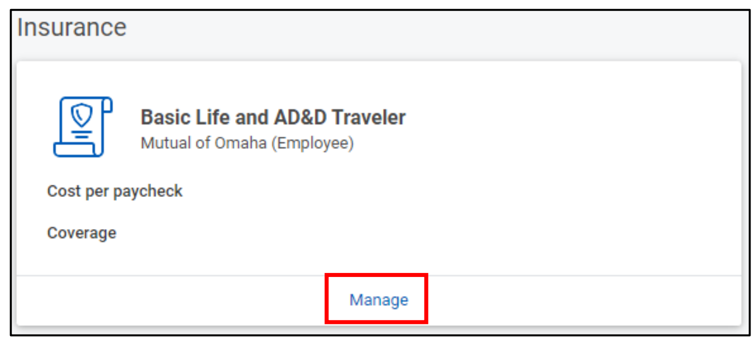


7) Click **Submit**.

8) Click **Open** on the associated pop-up. Or navigate to your *Workday Inbox* and click **Let's Get Started** on the *Change Benefit Elections* task.

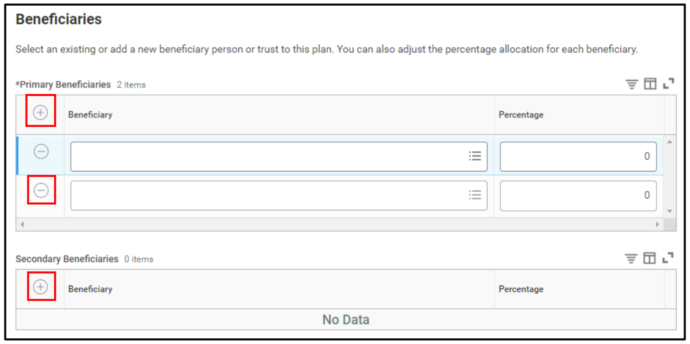


9) Review your current insurance elections and click **Manage** on the benefit tile.



10) Click **Confirm and Continue**.

11) Click **+** (plus sign) to add a beneficiary or click **-** (minus sign) to remove a beneficiary.

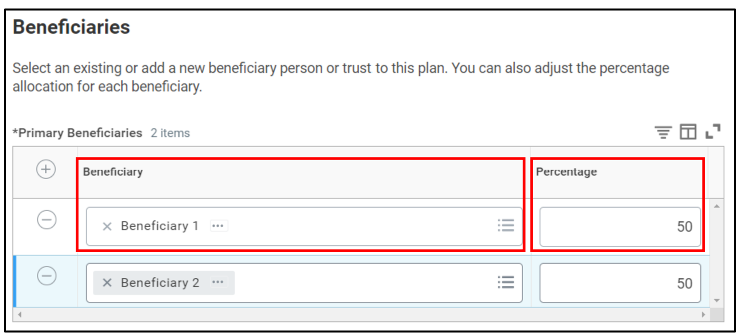


12) For *Primary Beneficiaries*, select an **Existing Beneficiary Persons** or **Existing Trusts**.

Note: You can add multiple beneficiaries to a single insurance plan.

13) Enter a **Percentage** allocation for each beneficiary.

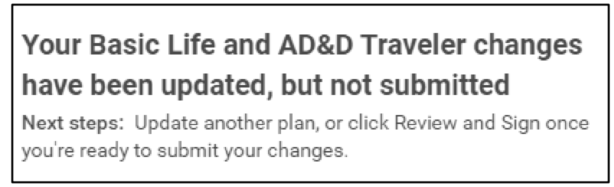
Note: Beneficiary allocation percentages must equal 100%.



14) Optionally, add *Secondary Beneficiaries*.

15) Click **Save**.

16) A pop-up will appear regarding the update, continue to review, and manage your beneficiaries.



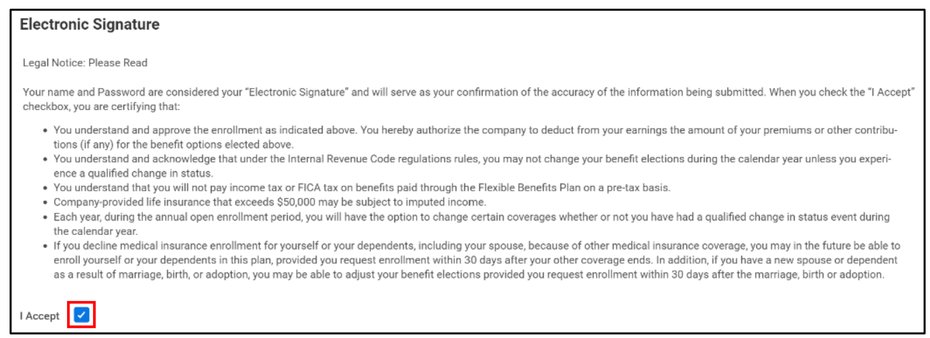
17) After reviewing and saving all your changes, finalize your beneficiary changes by selecting **Review and Sign**.

Note: Click **Save for Later** to keep your changes in your Workday Inbox to review and submit later.

18) Review the *Summary* to ensure your benefit selections are correct.

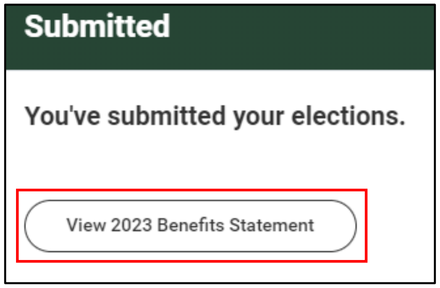
Note: If you find an error, click **Cancel** to go back and make changes.

19) Scroll down to the bottom of the page to read the **Legal Notice**, then click the **I Accept** checkbox after reviewing.



20) Click **Submit**.

21) After submission, you can view your statement by selecting **View *Year* Benefits Statement**.

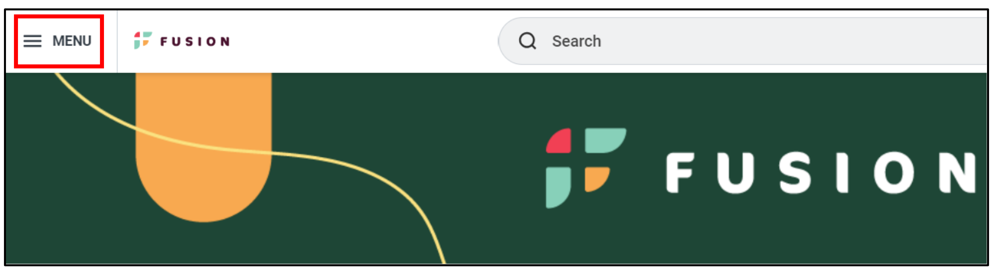


22) Click **Print** to create a PDF of your benefit elections for your records.

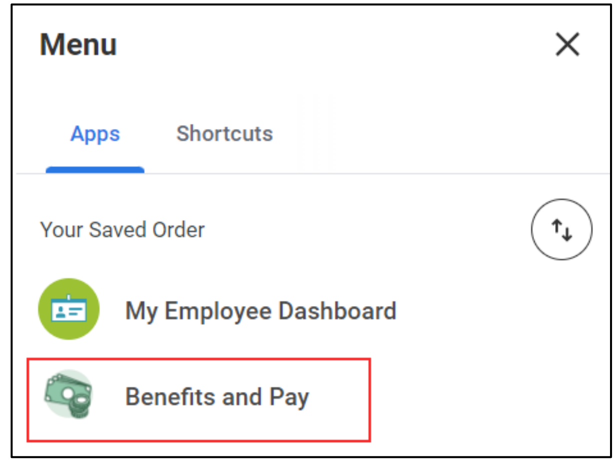
Edit or Delete Beneficiary Record

From the Home page:

1) Click **Menu**.

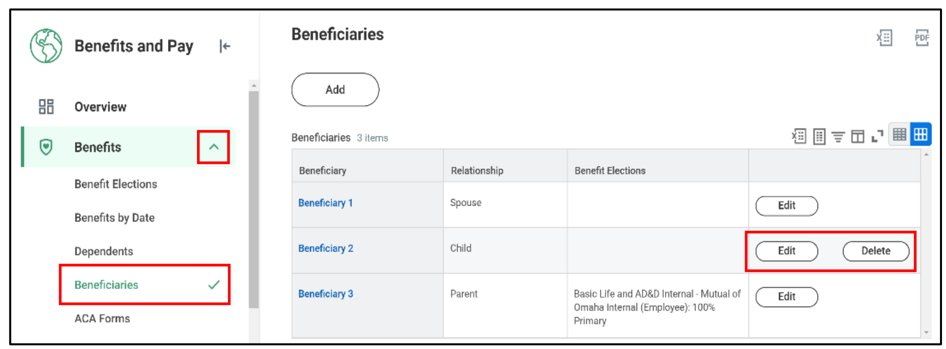


2) Select the **Benefits and Pay** app.

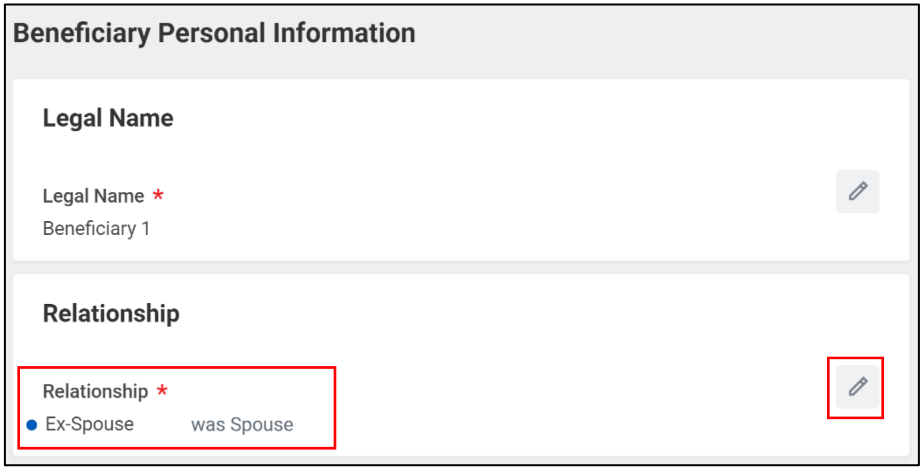


3) Click the *Benefits* tab, then click *Beneficiaries.* Select **Edit** or **Delete**.

Note: **Delete** is only an option if the benefiicairy does not have a current or historical benefit allocations.



4) Click the **Edit** (pencil icon) to make changes to desired fields, any changes will be noted.



5) Click **Submit**.

Note: This will not change their benefit allocation, it only edits their record. You must process a Change Benefit event to update beneficiaries on your existing insurance elections, refer to page 25.

Absence

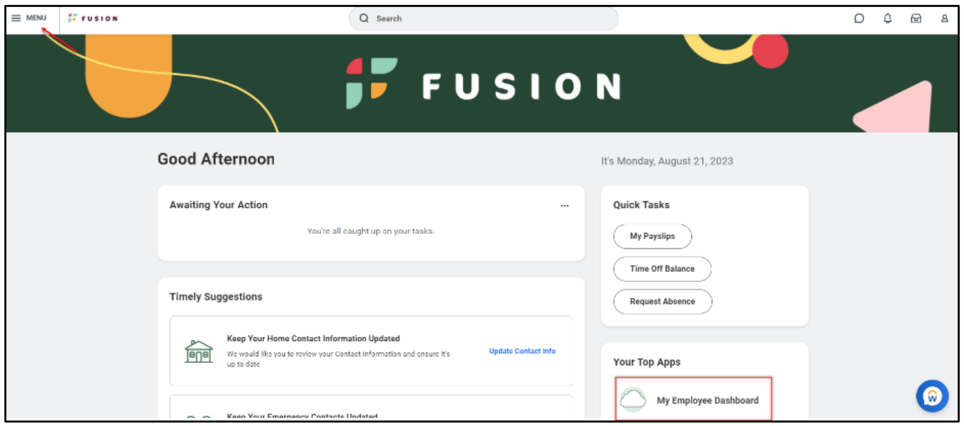
Requesting Personal Time-Off will be completed in Webtime and not in Workday.

If you have any questions contact the Leaves Team at leaves@fusionmedstaff.com.

View Absence Balances

From the Home page:

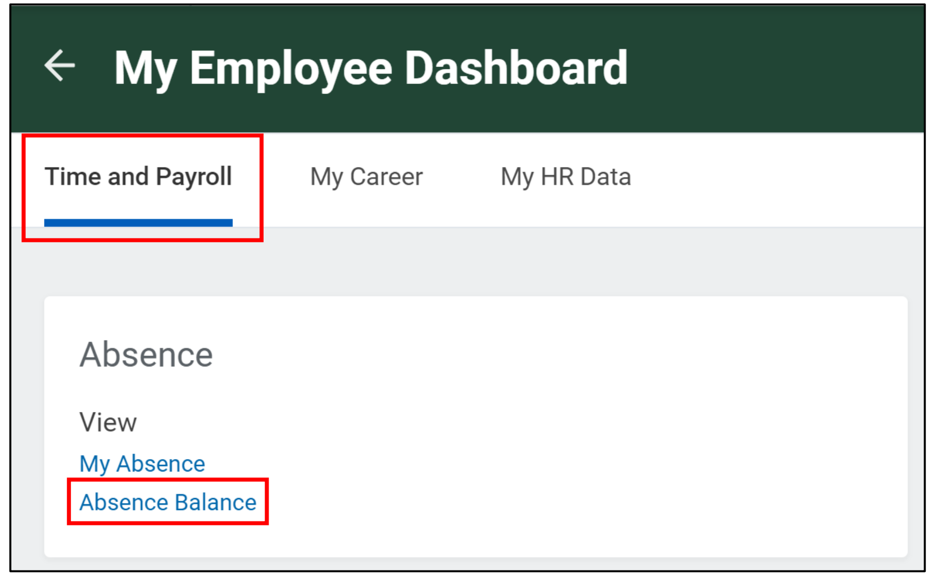
1) Go to *Your Top Apps* and select **My Employee Dashboard.**



Note: You may also manually search for the employee dashboard or use the *Menu* drop-down to find the dashboard.

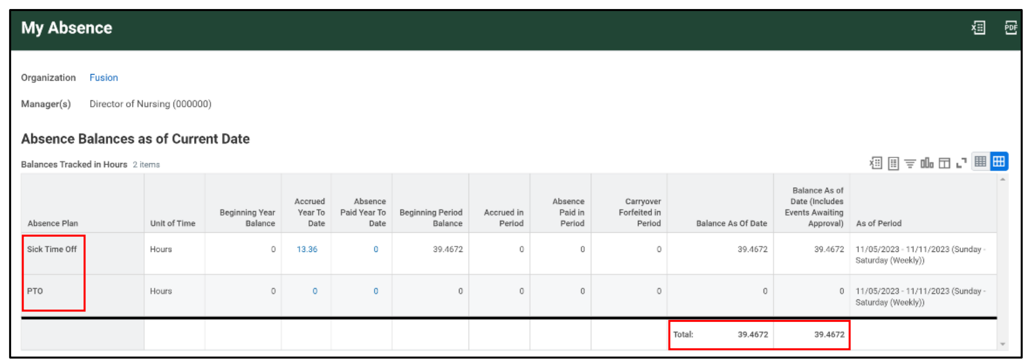
2) Click the **Time and Payroll** tab.

3) Find the *Absence* card and under *View* click **My Absence**.



4) Under **Absence Balances as of Current Date** view the breakdown of accrued amount of hours you have per absence plan.

Note: *Balances will remain 0 until accrued.*


My Absence

Organization Fusion

Manager(s) Director of Nursing (000000)

Absence Balances as of Current Date

Balances Tracked in Hours 2 items

Absence Plan	Unit of Time	Beginning Year Balance	Accrued Year To Date	Absence Paid Year To Date	Beginning Period Balance	Accrued in Period	Absence Paid in Period	Carryover Forfeited in Period	Balance As Of Date	Balance As of Date (Includes Events Awaiting Approval)	As of Period
Sick Time Off	Hours	0	13.36	0	39.4672	0	0	0	39.4672	39.4672	11/05/2023 - 11/11/2023 (Sunday - Saturday (Weekly))
PTO	Hours	0	0	0	0	0	0	0	0	0	11/05/2023 - 11/11/2023 (Sunday - Saturday (Weekly))
								Total:	39.4672	39.4672	

Accrual Balance is the time off accumulated over time for the balance period.

- **Absence Plan:** The category or type of absence. They are used to record absences, such as PTO or Sick Time Off.
- **Unit of Time**: Hours recorded for each column of the table.
- **Beginning Year Balance**: Number of hours a worker has for the absence plan at the beginning of the year.
- **Accrued Year To Date**: How many hours a worker has accumulated for the year.
- **Absence Paid Year to Date**: How many hours a worker has taken off for the year.
- **Beginning Period Balance**: How many hours of time off a worker starts off with for the specified period.
- **Accrued in Period**: How many hours of time off a worker has accumulated for the specified period.
- **Absence Paid in Period**: How many hours a worker has taken off for the specified period.
- **Carryover Forfeited in Period:** Any amount that has been lost due to exceeding the maximum amount that can be carried over from one year to the next, or a carryover balance having expired after not being using within the specified timeframe.
- **Balance As of Date**: Total remaining number of hours of time off a worker has not including any requests for time off that does not include any future requests.

  Note: Balance As of Date does take into account any past requests that have already been debited from the balance.

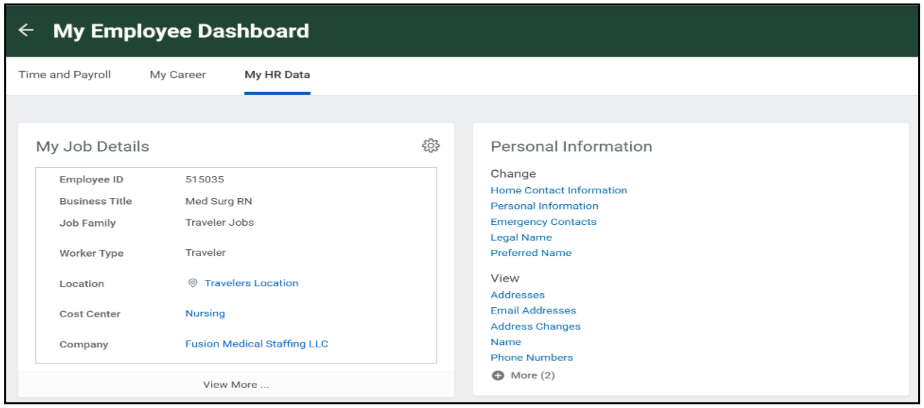
- **Balance As Of Date (Includes Events Awaiting Approval):** Total remaining number of hours of time off a worker has including any requests for time off that are awaiting approval.
- **As of Period:** The period of time that the table is referring to.

Corporate Recruiting

Jobs Hub Navigation

From the Home page:

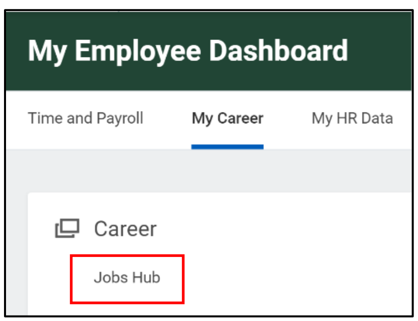
1) Go to *Your Top Apps* and select **My Employee Dashboard.**



Note: You may also manually search for the employee dashboard or use the *Menu* drop-down to find the dashboard.

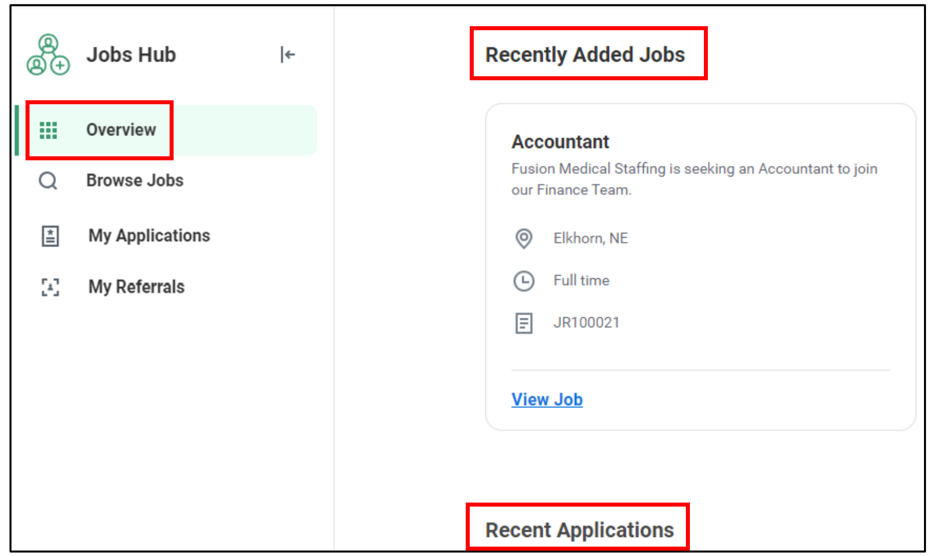
2) Click the **My Career** tab.

3) Select **Jobs Hub** from the *Career* card.

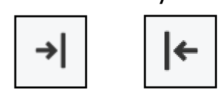


4) On the *Overview* tab, you can view:

- **Recently Added Jobs:** select **View Job** to open the job posting details.
- **Recent Applications:** to view your active and inactive applications.

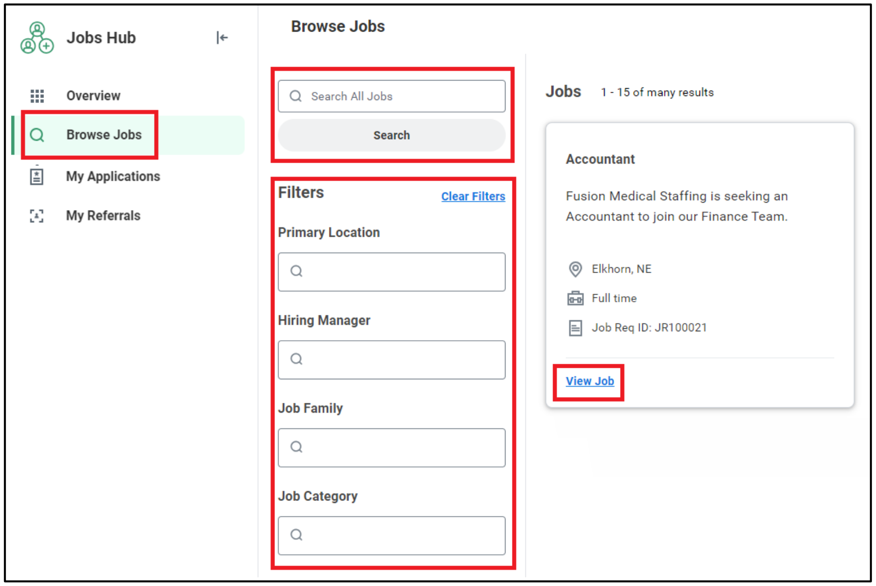


Note: Expand and collapse this menu by clicking the arrow with the line.

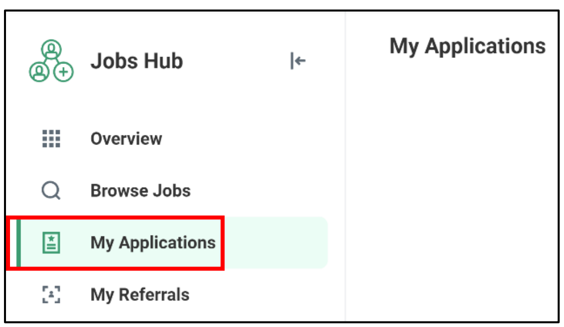


5) On the *Browse Jobs* tab, you can:

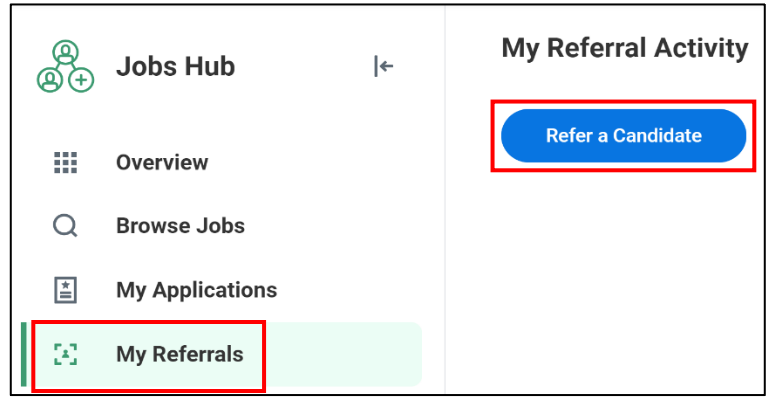
- Access all open corporate job postings. **Search** for specific details or use the **Filters** to narrow down results.
- Select **View Job** on the corporate posting you want to view, apply, or refer someone to.



6) On the *My Applications* tab, you can view all your active and inactive job applications.



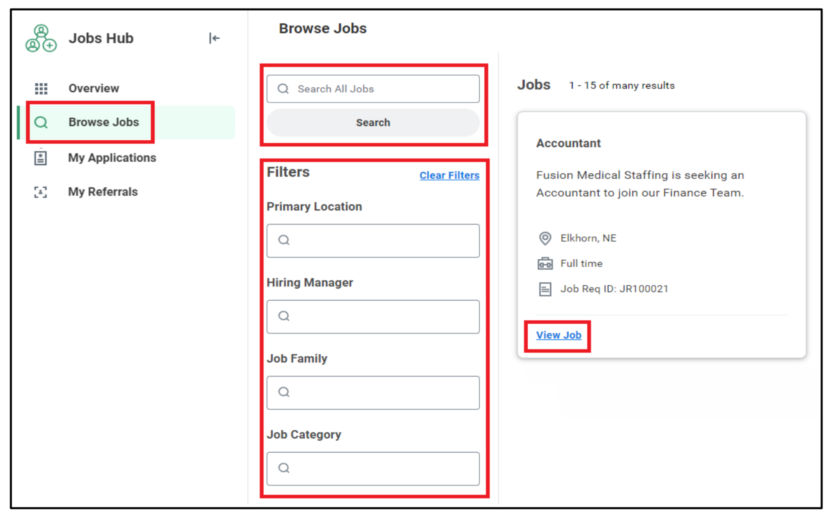
7) On the *My Referrals* tab, you can view your referrals and **Refer a Candidate**.



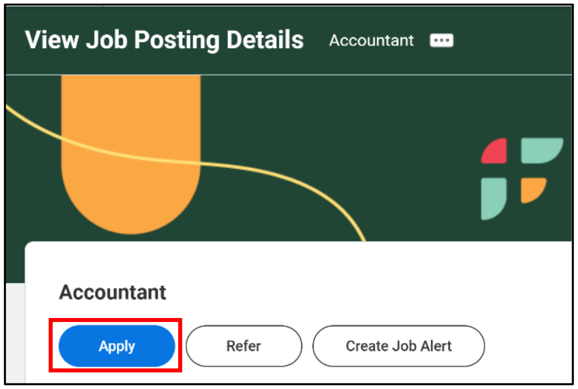
Applying to Corporate Jobs

From the **Browse Jobs** tab of the *Jobs Hub:*

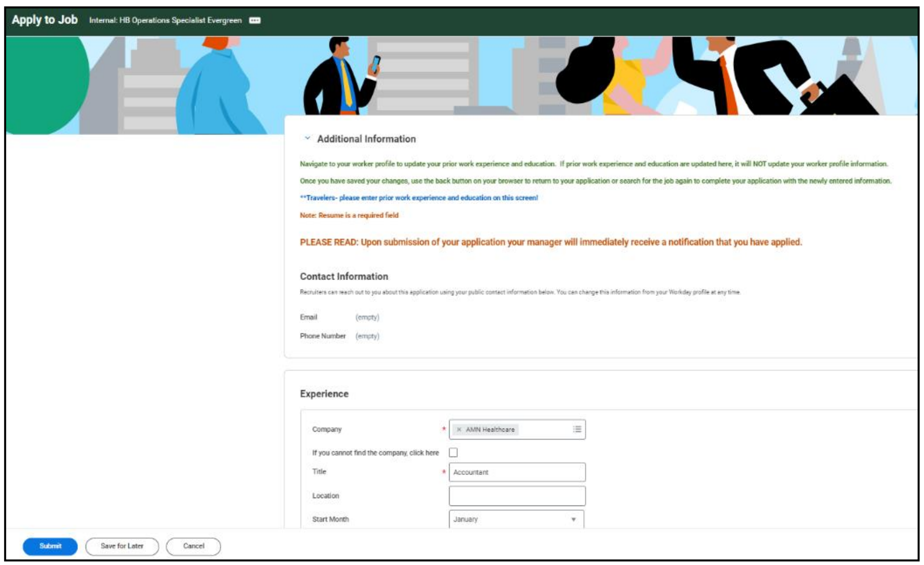
1) Click **View Job** to review the job posting.



2) When you find a job posting you want to apply for, click **Apply**.

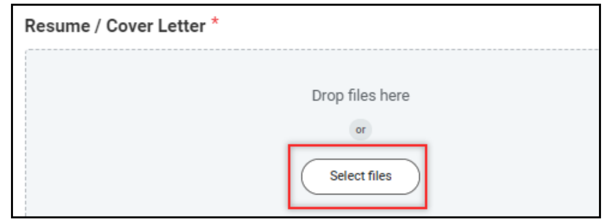


3) Enter the requested information on the application.

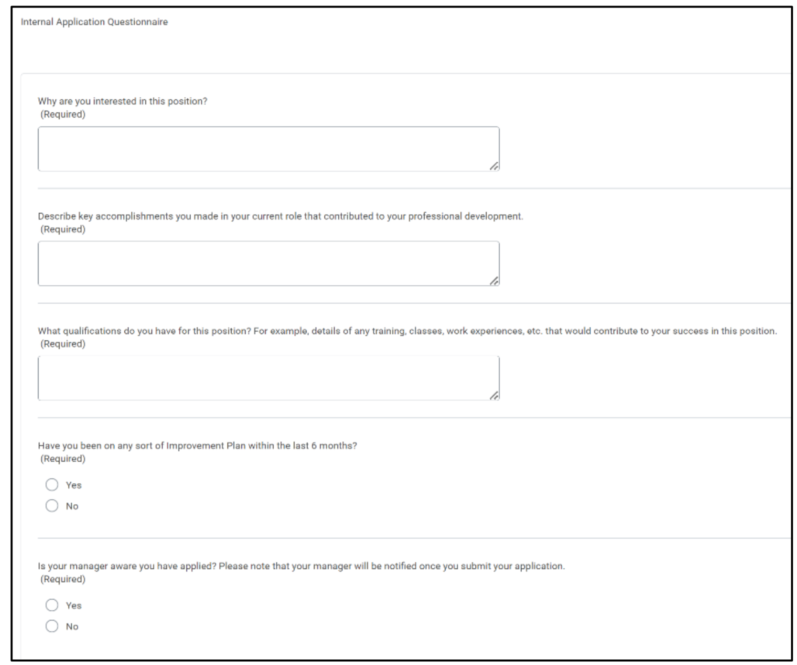


4) Attach *Resume* or *Cover Letter* by dropping the files in the grey box or click **Select Files** to upload from your device.

Note: This is required.



5) Answer the **Internal Application Questionnaire** questions.



6) Click **Submit** to complete the application.