UNIVERSITY
OF MIAMI

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Workday

All University of Miami faculty should review their personal information in Workday to confirm everything is up-to-date and correct – inaccurate information can put your pay, benefits options, retirement contributions and taxes at risk. Moving forward, this should be done annually as well.

1. Confirm Your Home Address Is Correct

Primary Address

Keeping your **Personal Information** (such as your legal name, phone number, and emergency contact details) up-to-date is always critical, but it's especially important to make sure your home address is correct; a missing or incorrect address could put you at risk when UM updates our disaster plan, receiving the wrong benefits options, or even being taxed incorrectly. Your **Primary Home Address** in Workday should be the address you use while working at the University of Miami and is the address for which taxes will be based – Workday will automatically deduct out-of-state taxes from your paycheck if your primary address is located in a state with a state tax (e.g., California, Oregon, etc.).

Mailing Designation

Workday does not automatically designate your home address as your mailing address – but designating a current mailing address is *critical* for ensuring you receive your tax forms (e.g., W-2s).

- **Are (or *Were*) You Working Out-of-State?**
  Your work address in Workday impacts your taxes, too. If you notice it's incorrect – for instance, if you've recently returned to on-site work after having worked out-of-state, but Workday still reflects you have a "remote" location – please contact your Faculty Affairs Liaison to make updates on your behalf using the "Change Job – Data Change" process.

  Refer to Faculty Affairs School and College Liaisons Resource Guide for help locating your school/college liaison.

2. Review Your Tax Withholding Elections

Most employees have taxes deducted from their paycheck, per IRS policy. The amount withheld depends on details provided on the Form W-4 at hire. Faculty can update their withholding elections at any time by following the steps in the [Update Federal Tax Elections](#) User Guide.

3. Opt Out Of Paper Tax Forms

The University strongly encourages employees to opt out of receiving paper tax forms and to instead retrieve their tax documents online through Workday. Online forms are more secure than paper tax forms and can be accessed more than two weeks earlier than when paper tax forms are mailed.

Individuals who opt out of paper tax forms can access their W-2 tax forms in Workday in early January. Paper tax forms will be mailed in late January.

4. Confirm Your Direct Deposit Information Is Correct

All employees should sign up for direct deposit. Make sure your direct deposit details are current and correct – refer to the **[Payment Elections (Direct Deposit)](#)** tip sheet.

5. Election of Benefits

Please visit the [Benefits and Wellness](#) website for more information on all the benefits the University offers. *If benefit eligible*, you should sign up for benefits – refer to the [Benefits](#) video tutorial.

Workday for Managers

Find Your Supervisory Organization(s)

In Workday, employees who report to you will be grouped into one or more Supervisory Organization(s), which are arranged hierarchically in order to map the University's full organizational structure.

You can find your Supervisory Organizations (also called "Sup Orgs") in Workday by searching for your name using the search bar in the upper left corner of your screen. Alternately, you can navigate to your worker profile by selecting "View Profile" from the menu found by selecting the cloud icon in the top right corner of your screen. Once you're on your profile page, select "Overview" and then select the "Organizations" tab to review a list of organizations you belong to and Sup Orgs you lead.

As a Manager, you are responsible for approving your employee's time sheets and time off requests in Workday.

Manager Responsibilities

Workday Process Monitoring

All Managers should ensure employees on their team complete essential tasks in Workday, such as:

- Completing their Form I-9
- Entering and updating direct deposit information
- Entering and updating home address and emergency contacts

Managers will also facilitate the completion of TALKs [**T**ransform, **A**lign, **L**isten, **K**now] (performance evaluations) in Workday.

Time and Absence Approvals

Managers should also to monitor and complete time and absence related tasks in Workday in order to ensure employees are paid accurately and on time.

Managers are responsible for the following:

- **Approving Time Sheets:** Timely approval of hours worked is critical for ensuring employees are paid correctly and on time.

- **Approving Time Off Requests:** Managers should pay attention to their employees' absence records and ensure they are entering sick days and time off.

Tips for Managing your Workday Approvals

In order to avoid delays and hardships to your staff, please make sure you stay on top of your approvals by doing the following:

- **Monitor your Inbox:** All tasks and actions you must complete will come to your Workday Inbox, which will automatically generate a message to your UM email account when you have required steps to take in Workday. If you are receiving notifications for employees you don't manage, please make sure to work with your office administrator to identify and coordinate any Workday changes that are needed.
- **Delegate your Workday responsibility when you are out:** If you will be out of the office for an extended amount of time, please submit a Delegation Request. This will re-route processes you normally approve to the person you designate so your responsibilities will be covered while you are out.

Tools and Resources for Managers

Apps

Apps are icons on your Workday homepage that provide you easy access to relevant reports and information. To personalize your apps, log into Workday and select the gear icon to the right of your name. To add new apps, select Menu the + sign under Optional Worklets, then scroll through the "Worklet" menu. Some apps you may find particularly helpful include:

- **My Team**: This app provides you an easy way to access information about employees who report directly and indirectly to you. From the app you can access quick links to employee profiles for your direct reports, or you can select "My Org Chart," which will provide you an interactive organizational chart you can use to navigate to the profiles of all your direct and indirect reports. This app also features the "Compare Team" report, which provides a summarized comparison of team members in an organization, including length of service, base pay amounts, and salary increases that can be used to examine internal equity.
- ** Team Time Off:** Use this app to view useful absence data such as Approved Time Offs and who is On Leave; the Time Off and Leave Calendar is especially convenient for tracking the Time Offs for all of your direct reports.