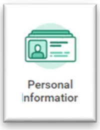
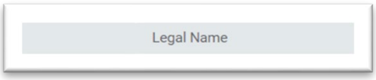
How Do I Change My Legal/Preferred Name?

Changing Legal Name

1. From the Workday homescreen, click the **Personal Information** 

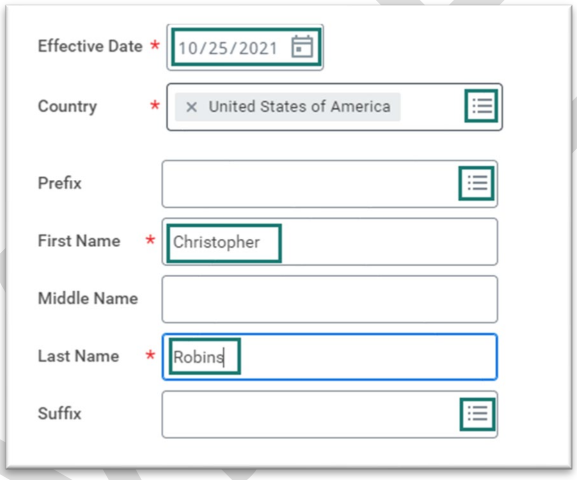
application.

2. Click the **Legal Name** 

tab .

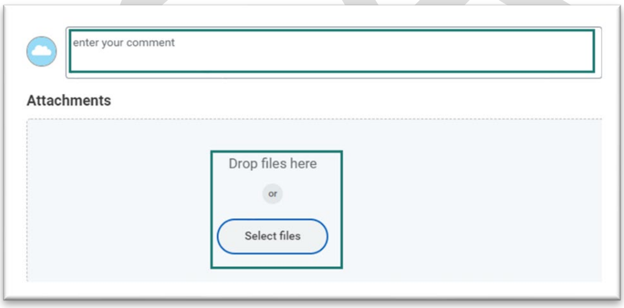
3. All fields with a red asterisk(*) are required. Fields can be typed directly into or fields with a prompt  will contain a list to choose from.
   - Enter the **Effective Date*** by typing directly into the field or selecting the date from the calendar icon.
   - Edits can be made to the following fields:

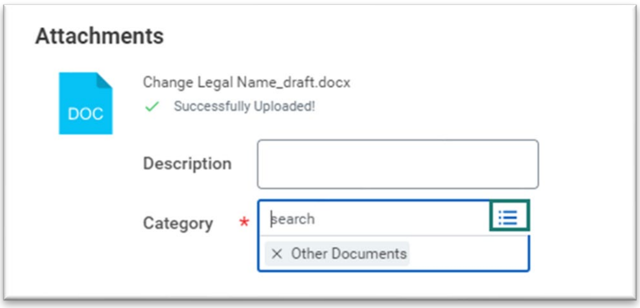
Country*
Prefix*
First Name*
Middle Name
Last Name*
Suffix



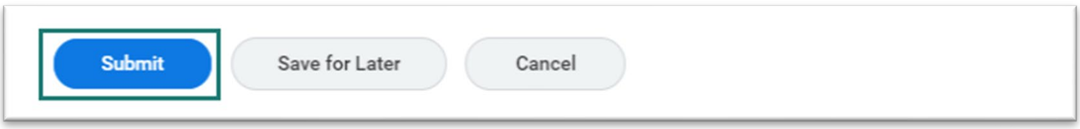
4. Enter your comments and attach all relevant document/s.

   NOTE: it is a legal requirement to attach certified documentation for a legal name change.



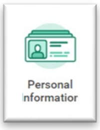


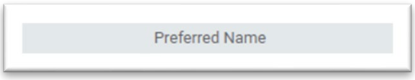
5. Click **Submit** when complete.



Changing Preferred Name

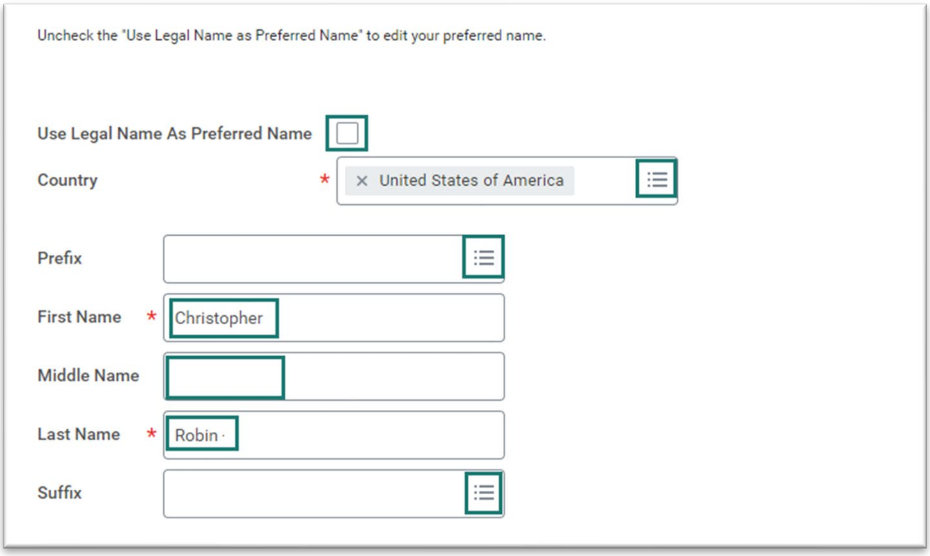
Your preferred name is used in Workday for your staff profile and how you are represented in organization charts.

1. From the Workday homescreen, click the **Personal Information** 

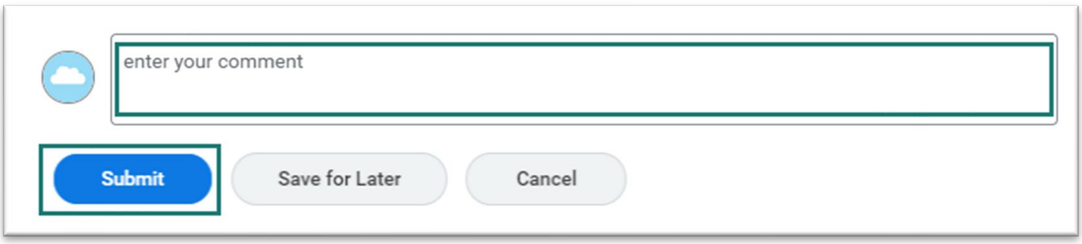
application.
2. Click the **Preferred Name** 

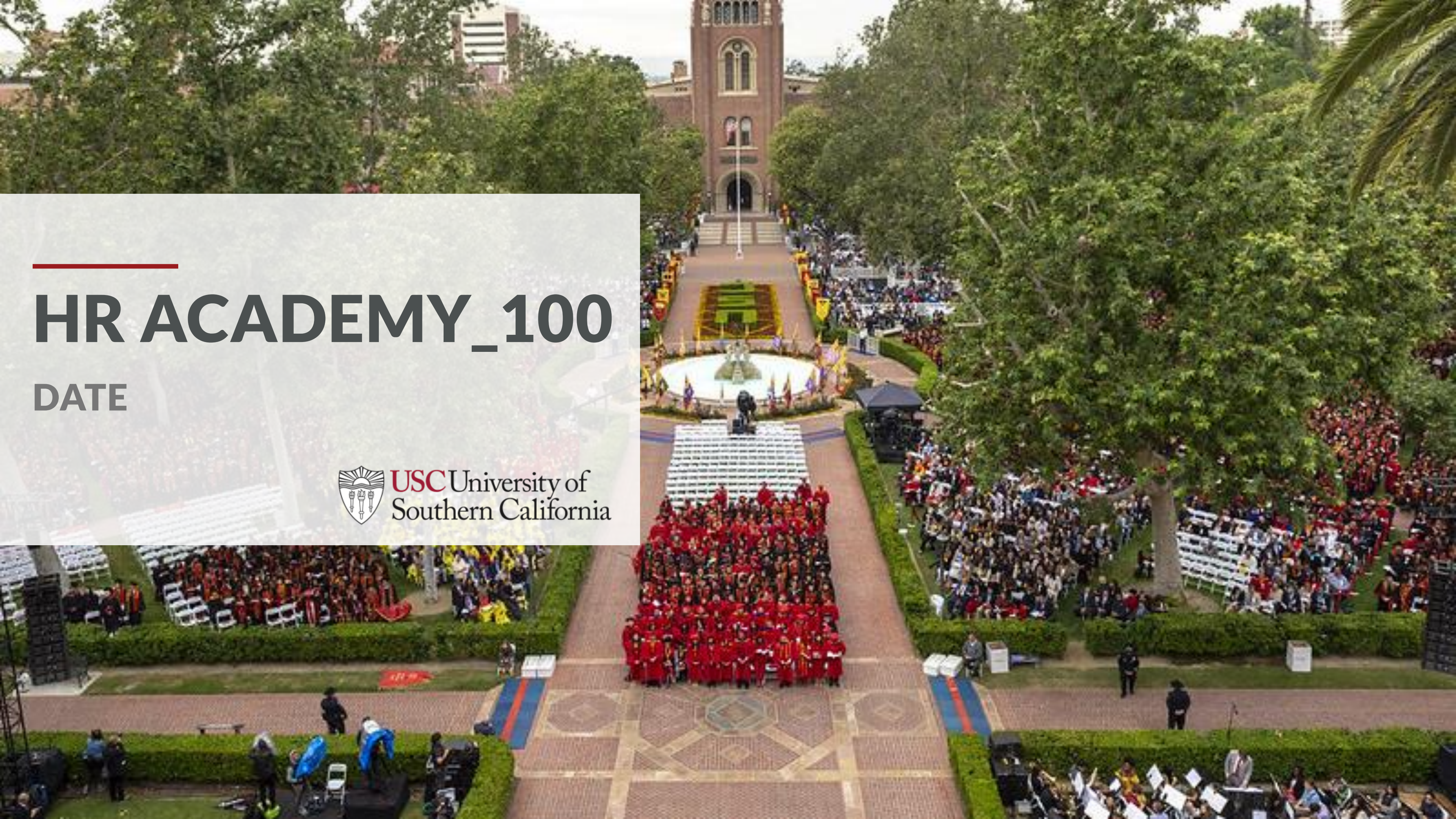
tab.
3. Complete the mandatory fields*.

   NOTE: you can select Use Legal Name as Preferred Name option if going from a preferred name back to your legal name.



4. Enter your validating comments and click **Submit**.





HR ACADEMY_100

DATE

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PRESENTATION AGENDA

01 Logistics

02 Pre-course Questions

03 Courses

04 Post-course Questions

05 Where to go for Help

WELCOME TO HR ACADEMY

WE ARE EXCITED YOU'RE HERE! LET'S GET STARTED

HRA LOGISTICS

Courses

DATA-INFORMED DECISION-MAKING

CLIENT EXCELLENCE

MANAGING WORKSTREAMS

PEOPLE-CENTRIC SOLUTIONS

Insert HR Academy link here as well as have the web address for participants

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DATA INFORMED DECISION MAKING

"*Without data, you're just another person with an opinion.*" - W. Edwards Deming

WHAT IS DATA INFORMED DECISION MAKING?

Data-driven decision making is defined as using facts, metrics, and data to guide strategic business decisions that align with goals, objectives, and initiatives.

HOW DOES DATA INFORMED DECISION MAKING APPLY TO HR AT LARGE?

Add information here. TBD

WHY DATA INFORMED DECISION MAKING IS IMPORTANT IN THE NEW HR.

Add Information TBD

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CLIENT EXCELLENCE

"*"One of the deep secrets of life is that all that is really worth doing is what we do for others."* -Lewis Carroll, Writer and Mathematician

WHAT IS CLIENT EXCELLENCE?

TBD

HOW DOES CLIENT EXCELLENCE APPLY TO HR AT LARGE?

Add information here. TBD

WHY CLIENT EXCELLENCE IS IMPORTANT IN THE NEW HR.

Add Information TBD

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Add Information TBD

MANAGING WORKSTREAMS

““*You don’t have to see the whole staircase. Just take the first step.*” – Martin Luther King Jr.

WHAT IS MANAGING WORKSTREAMS?

TBD

HOW MANAGING WORKSTREAMS APPLY TO HR AT LARGE?

Add information here. TBD

WHY MANAGING WORKSTREAMS IS IMPORTANT IN THE NEW HR.

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Add information here. TBD

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PEOPLE-CENTRIC SOLUTIONS

“”*Every solution created should be in service of people.”* - Forbes

WHAT IS PEOPLE-CENTRIC SOLUTIONS?

TBD

HOW DOES PEOPLE CENTRIC SOLUTIONS APPLY TO HR AT LARGE?

Add information here. TBD

WHY PEOPLE-CENTRIC SOLUTIONS IS IMPORTANT IN THE NEW HR.

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WHAT IS PEOPLE-CENTRIC SOLUTIONS?

TBD

HOW DOES PEOPLE CENTRIC SOLUTIONS APPLY TO HR AT LARGE?

Add information here. TBD

WHY PEOPLE-CENTRIC SOLUTIONS IS IMPORTANT IN THE NEW HR.

Add Information TBD

PRE-COURSE QUESTIONS

1. What can you tell me about this course?

2. What experience do you have with this topic?

3. What do you hope to get out of this course?

4. Which skills do you hope to improve by taking this course?

POST-COURSE QUESTIONS

1. How do you think this topic applies to you?
2. How will you use this info?
3. What are you looking forward to about exploring this topic further?
4. Is it relevant to you?
5. Do you feel anything was missing? What?


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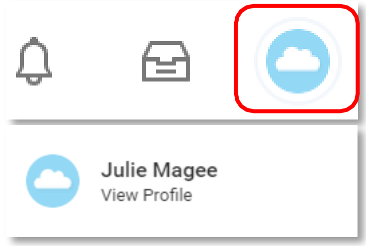
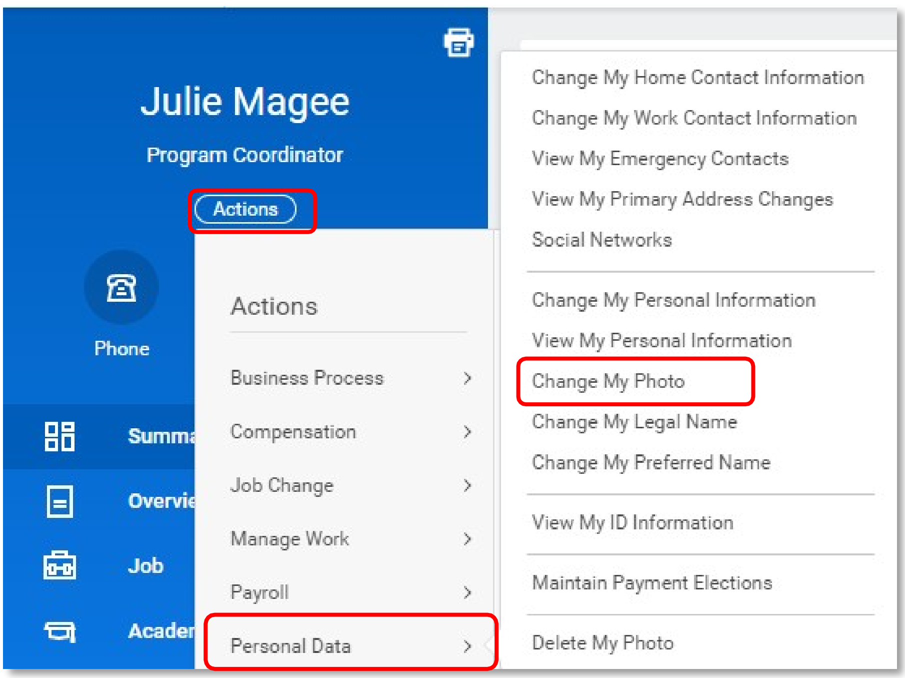
How to change your profile picture in Workday

All staff and affiliates in Workday are required to have a portrait profile picture within Workday. You can update your profile picture at any time.

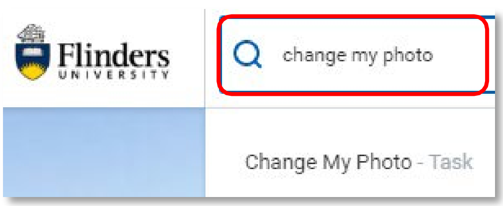
To change your profile picture, click the *profile icon* and *View Profile.*



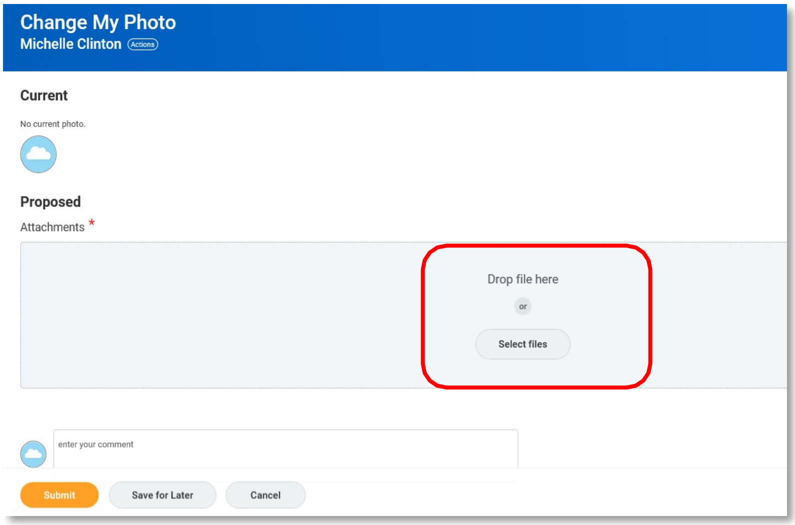
Select *Actions, Personal Data, Change my Photo*



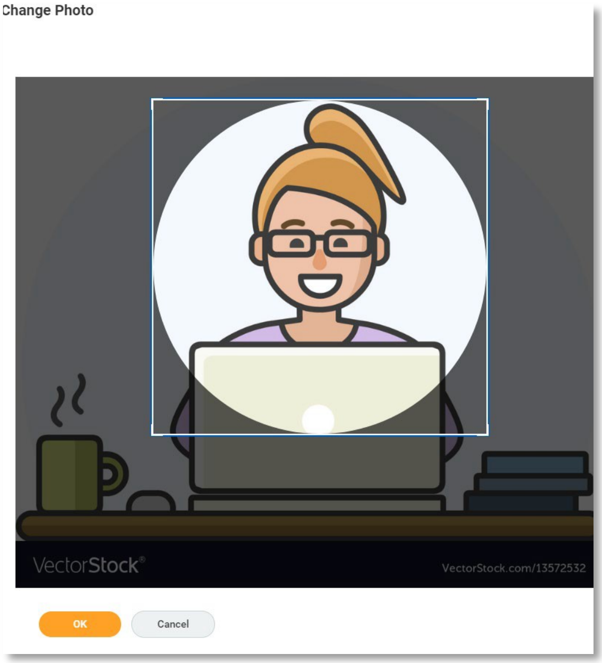
Alternatively, you can type “Change my photo” in the search bar and enter.



Drag your new profile picture from your data source and drop into the attachments area. Alternatively click Select file and choose your image.

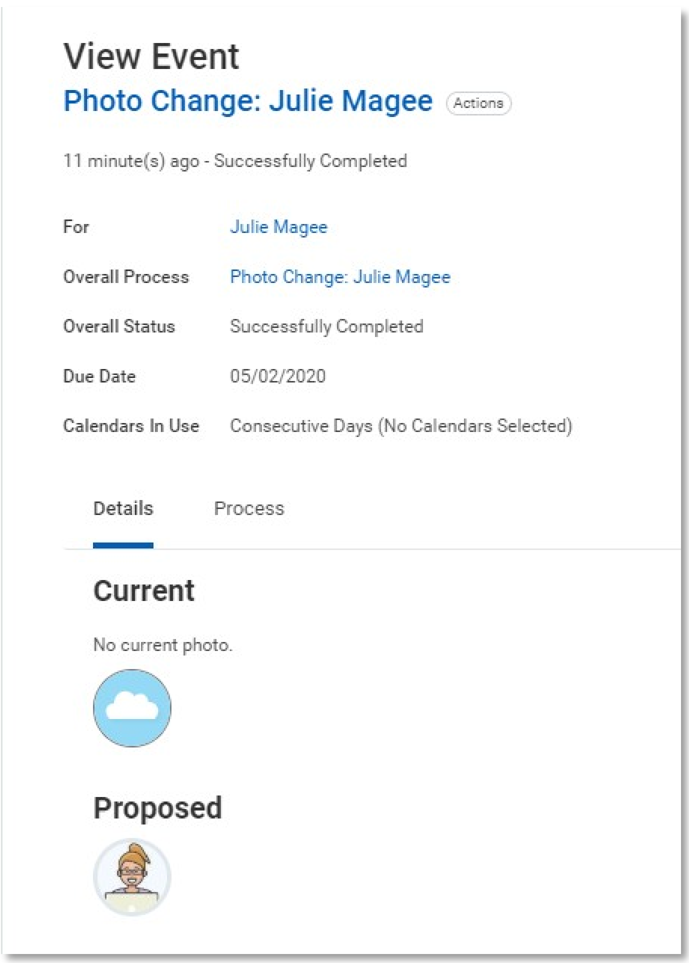


A circle will appear, move the circle to the desired position to centre your picture. Click *OK.*



When you are happy with your new profile picture, click *submit.*

You can go back at any time to change your picture
An action will be sent to your supervisor for their approval.
Once approved, you will receive a notification in your Workday inbox and your new profile picture will be in your image icon.



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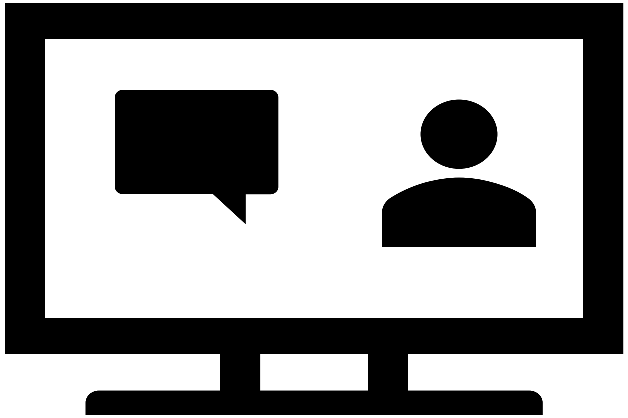
STORY TELLING WITH DATA

TECH CHECK



A little about me…

- Trainer for 10 years.
- USC for 6 years.
- Passionate about education.
- Love to travel.

USC

HRACADEMY

TODAY’S LAB

- Utilize the “5 Step Storytelling with Data” framework to craft a story about Polly’s Pineapple Company’s employee retention issue. You will:
  - Work as a group to come up with a “big idea”
  - Map it out using mural
  - Put it all together into a story to communicate to the group





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STORY TELLING **WITH DATA**

How have you influenced stakeholders in the past?

STORYTELLING WITH DATA PROCESS

STEP ONE

Uncover a Story Worth Telling

STEP ONE

UNCOVER A STORY WORTH TELLING

STEP ONE

UNCOVER A STORY WORTH TELLING

Look for Correlations

Identify Trends

Draw Comparisons

STEP TWO

Be Aware of Your Audience

STEP TWO

BE AWARE OF YOUR AUDIENCE

01 **Who is my audience?**

02 **Is this story relevant to my audience? Does it solve a problem they care about or provide needed insight?**

03 **Have they heard this story before?**

STEP THREE

Build Your Narrative

STEP THREE

BE AWARE OF YOUR AUDIENCE

Consider

Who are you talking to?

What do you want your audience to know or do?

How can you use your data to make your point?

STEP THREE

BE AWARE OF YOUR AUDIENCE

Context

What is the situation? Why are you telling the story? Look for a hook to engage.

Characters

Who are the key players?

Problem

What is the conflict?

Solution

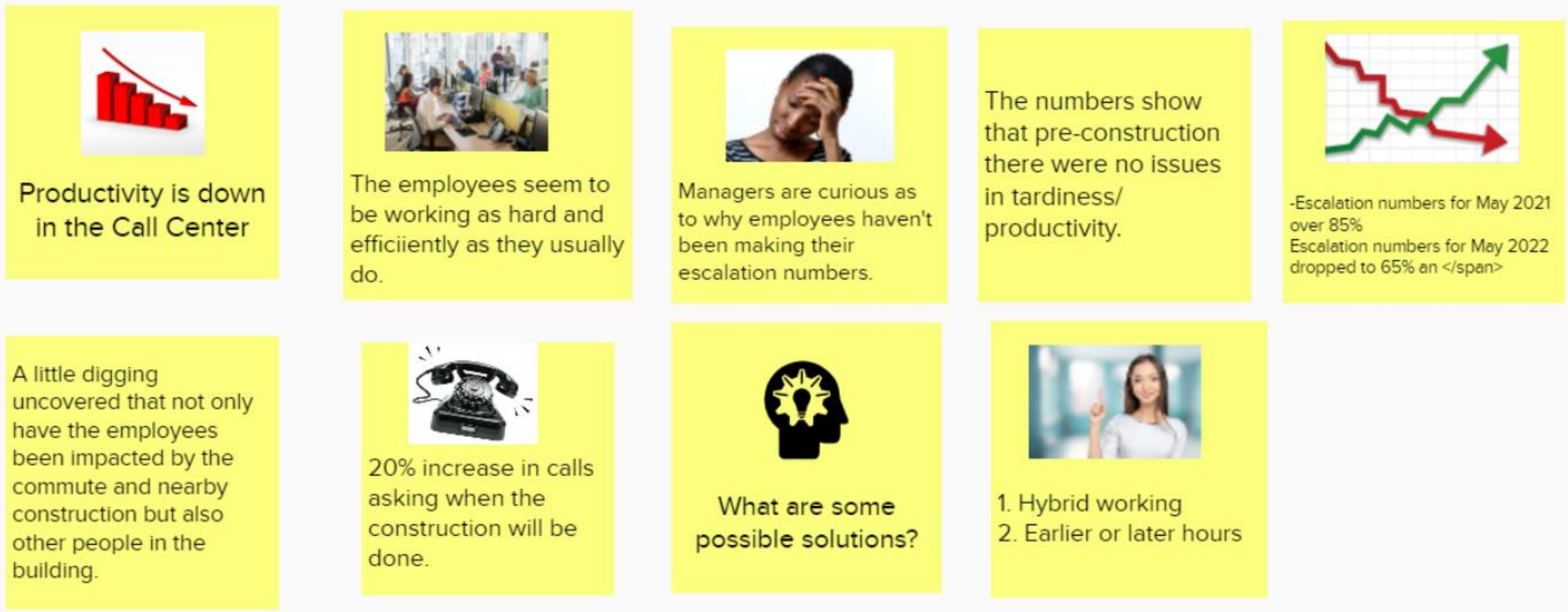
How can the problem be solved? Or what key insights or actionable steps should we take?

CREATE YOUR COMPELLING STORY

Directions:

1. You will be split up into groups of 3 or 4 and you will work with a data set and a scatter plot of the data that represents the reason that employees are leaving Polly's Pineapples.
2. There are two sets of numbers-HR Business Partner Input and Exit Surveys. Your task is to take this data and create a "story" about what the data shows to tell your fictitious stakeholders.
3. You will fill out a "Big Ideas" worksheet to regarding your stakeholders.
4. Write a few sentences explaining the data on your "Big Ideas" worksheet.
5. Talk through how you would do so out loud, making assumptions as necessary for the purpose of this exercise.

STORYBOARD HOW TO:



1. Create your frames (sticky notes in Mural).
2. Under each frame, write what's happening that corresponds to that scene. Use visuals and emotions to explain the narrative.
3. Refer back to step 3 above and set your context, define your characters, focus on the problem to solve and then the solution. All in a linear sequence in each of the rectangles.

DEBRIEF QUESTIONS

1. How much more compelling was the story when you used a graph, chart, or other data representation? When you used storytelling?

Additional Resources:

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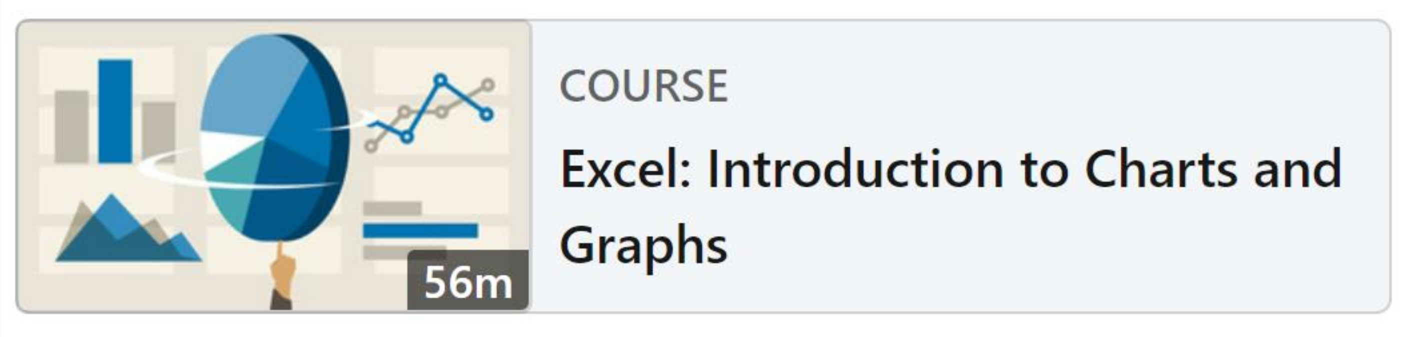
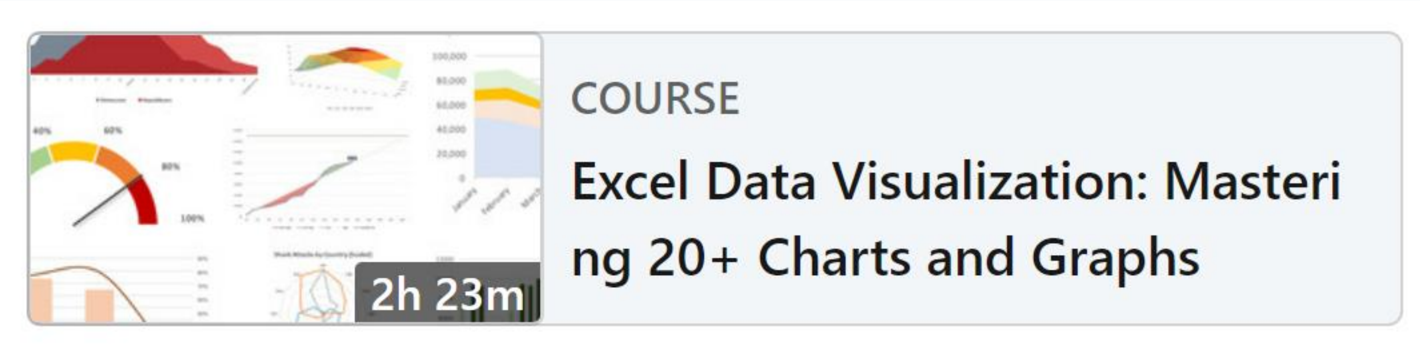


[Excel: Introduction to Charts and Graphs]



[Excel Data Visualization: Mastering Charts and Graphs]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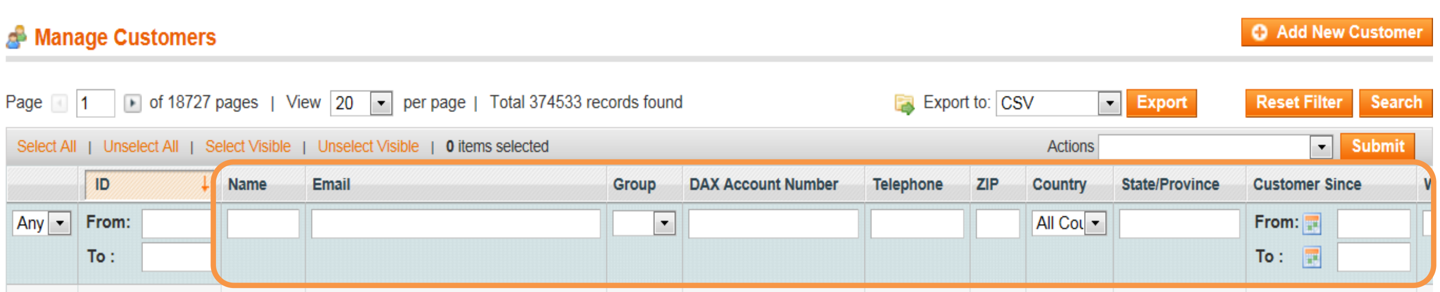
Old and New CSR Panel Documentation

Searching for a Customer

Old: In the old environment, searching for a customer could be done by searching the following fields: **Last Name, First Name, Company Name, City, State, Zip, Email** or by combining any of these fields. You could also do a separate search by **DAX Account Number**.

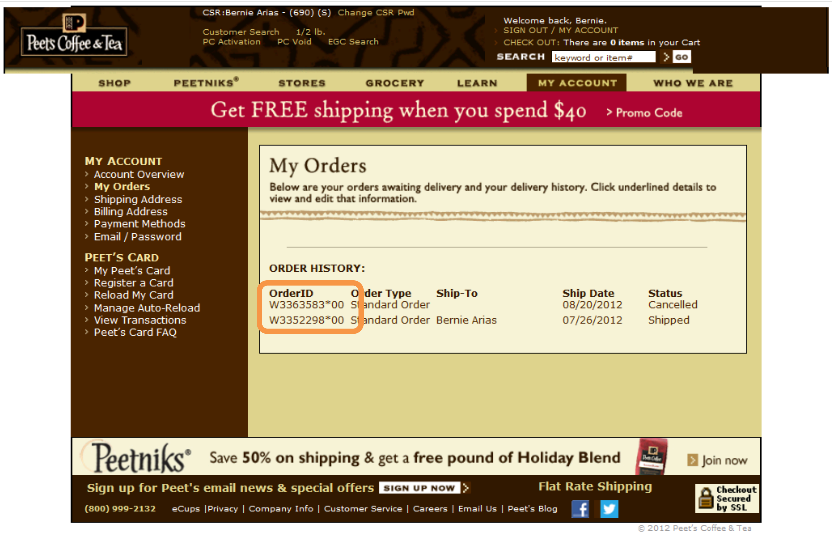
New: In the new system searching for a customer can be done in the [Customers] [Manage Customers] screen. Similarly, you can search by any of the following fields: **Name (first, last, company) Email, Zip, State** and **DAX Account Number**. Entries are not case-sensitive, and you can combine any of the fields for more selective filtering. You can also do a "Global Search" for a customer or order containing a customer's name by typing their name in the global search box.



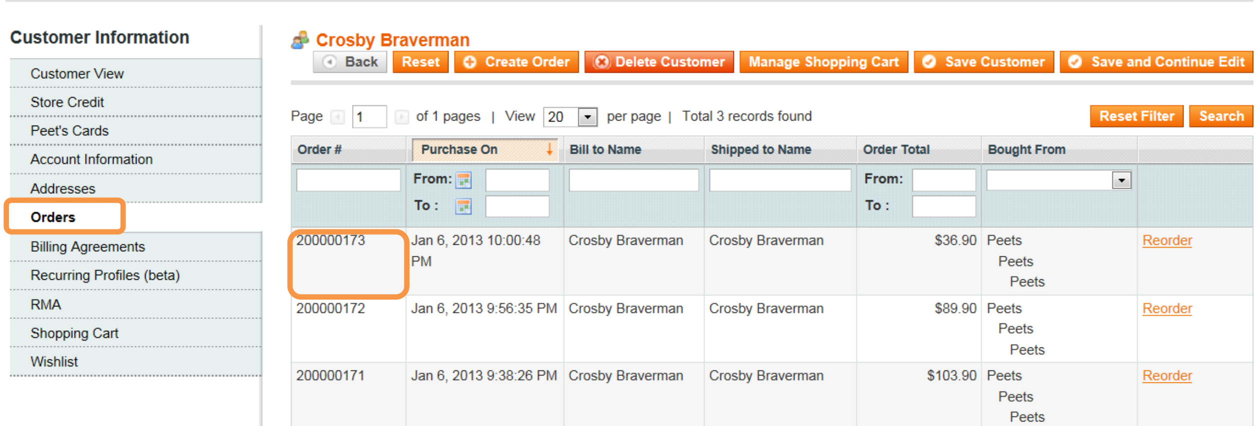
LEARNING & DEVELOPMENT

Viewing Customer Orders

Old: In the old environment, after the customer has been located within the Admin panel, clicking **My Orders** on the left-hand side of the screen will brought up the order history. Clicking on the **Order ID** allowed you to view the screen with the order details.

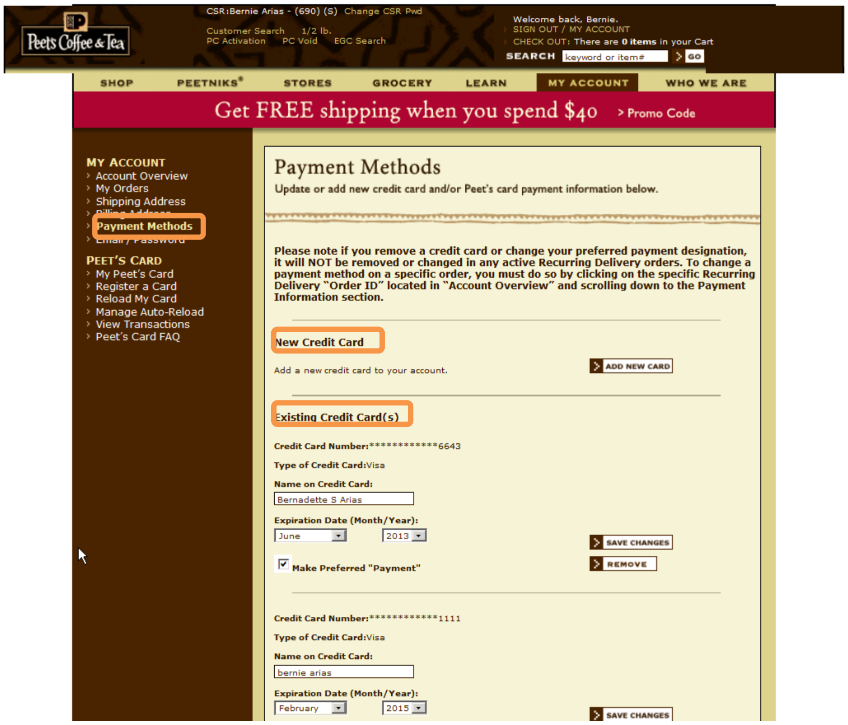


New: In the new environment, once the customer is located, any orders can be viewed by clicking **Orders** on the left-hand side. Double clicking on the row with **Order #** (similar to the **Order ID**) will open a screen with the order details. An alternative method for order lookup, is locating the order under [Sales][Orders].

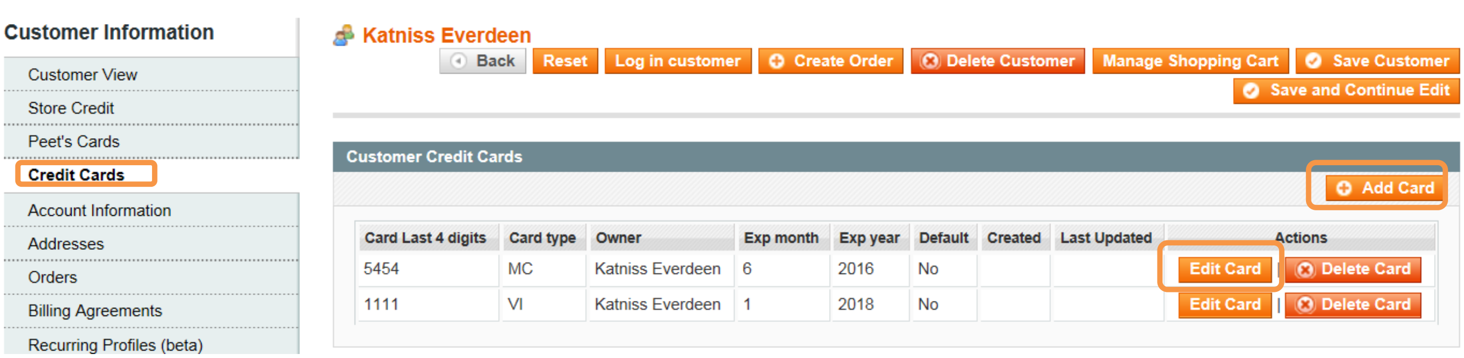


Editing Customer Payment Methods Information

Old: In the old environment, after the customer has been located within the Admin panel, clicking **Payment Methods** on the left-hand side allowed you to add a new credit card and edit an existing credit card.



New: In the new environment, editing credit card payment information in the CSR Panel can be done in a similar way in the customer information form by clicking **Credit Cards** on the left-hand side. This will allow you to add a new credit card and edit and existing credit card.



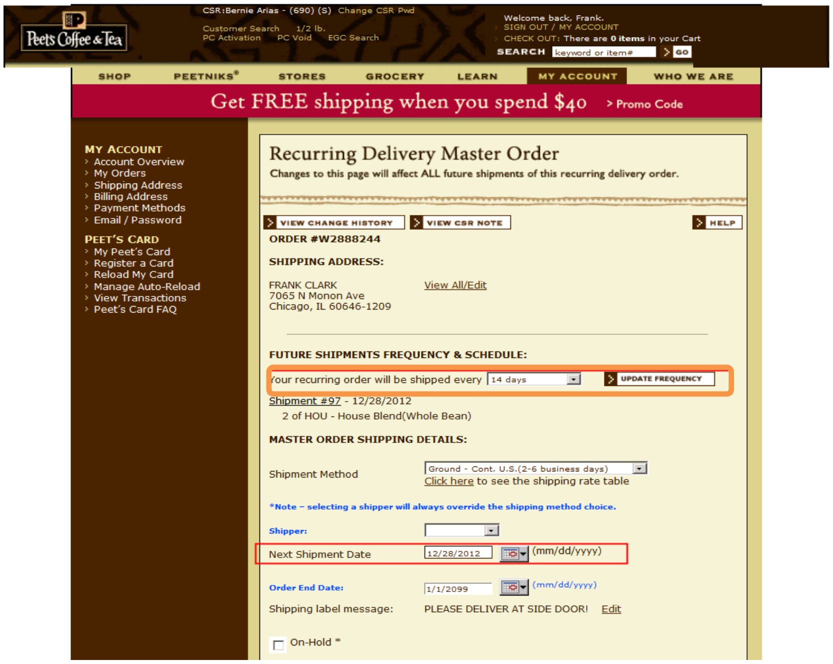
Adding Items to an RD Order

Old: In the old environment in the Recurring Delivery Edit Shipment screen, by clicking on **Add Items** you would be taken to the area of the website to go shopping to add items to the recurring delivery.

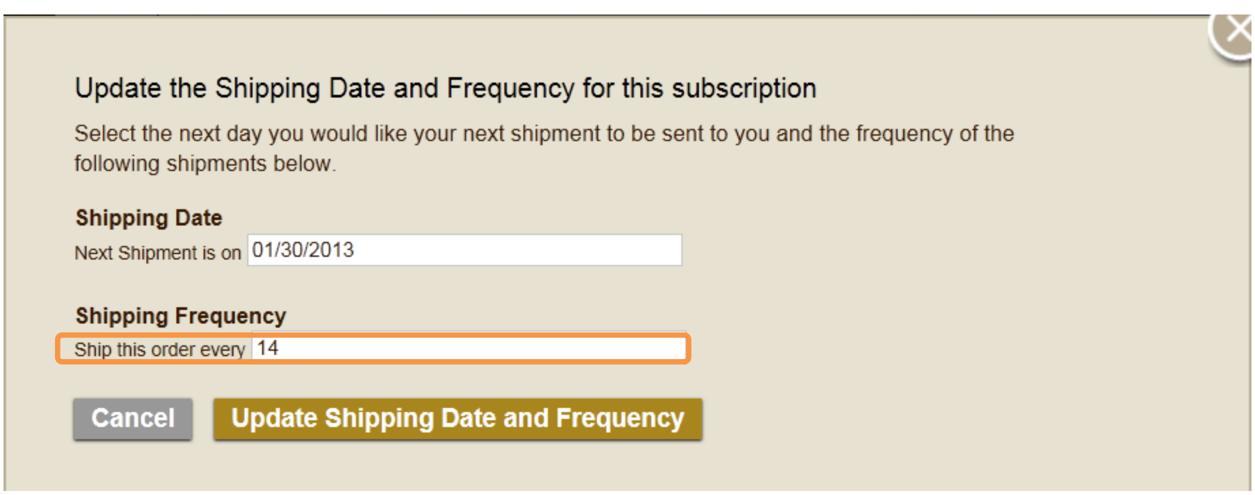
New: In the environment, you will login to the CSR Admin Panel, locate the customer and "Login As Customer" (spoofing). Under their My Subscriptions section, locate the subscription to add an item to and similar to how you did in the old environment click **Add Items to Subscription** and go shopping for the items to be added to the subscription (recurring delivery).

Updating Shipment Frequency for a Recurring Delivery (Subscription)

Old: In the old environment, in the Recurring Delivery Master Order screen you made frequency choices by using the drop-down menu under the **Future Shipments Frequency & Schedule.**

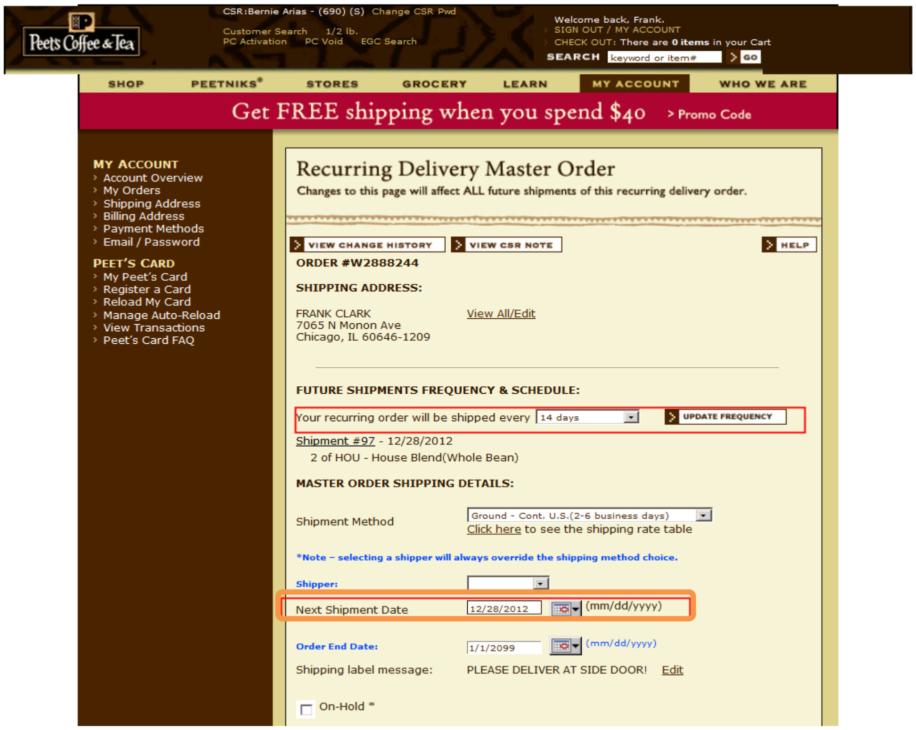


New: In the new environment once logged in as the customer under their My Subscription screen, select **Update the Shipping Date and Frequency**. And similarly in this screen you are able to make changes to the shipping frequency field.

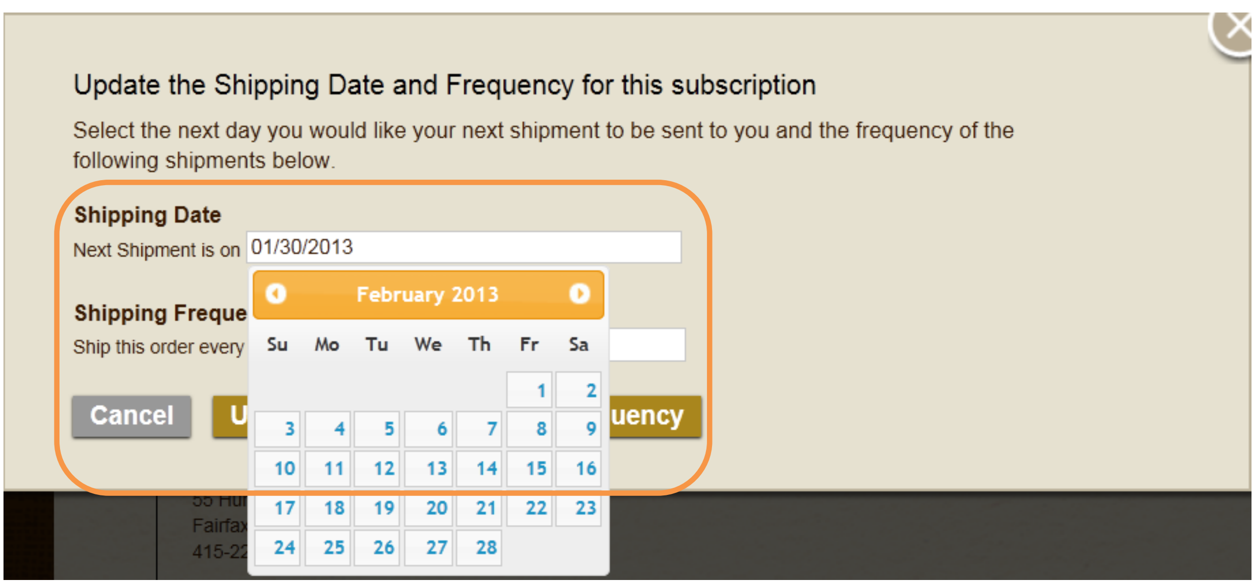


Changing Next Shipment Date

Old: In the old environment you made changes to the next shipping date in the Recurring Delivery Master Order screen by clicking on the calendar next to **Next Shipment Date.**



New: In the new environment once logged in as the customer under their My Subscription screen, select **Update the Shipping Date and Frequency**. And similarly in this screen you are able to make a change in the **Next Shipment is on** field.

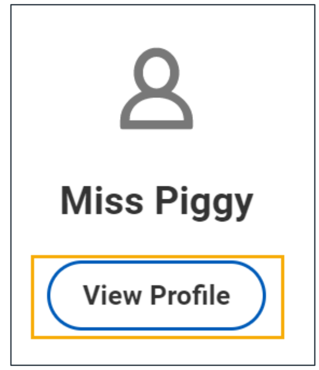


Talent: Hiring a Temporary Worker

This job aid outlines the steps required to hire a brand new/external temporary worker.

START HERE

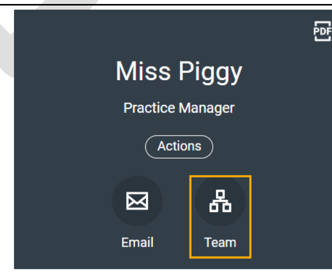
From the Workday's home page, select **Your Profile Photo >View Profile**.



Note: *Fields with a red asterisk * are mandatory.*

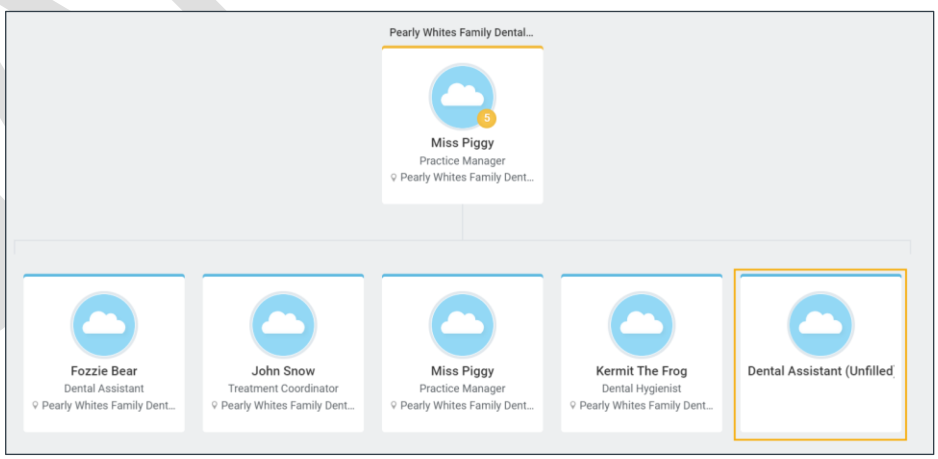
1

- Select **Team**.



2

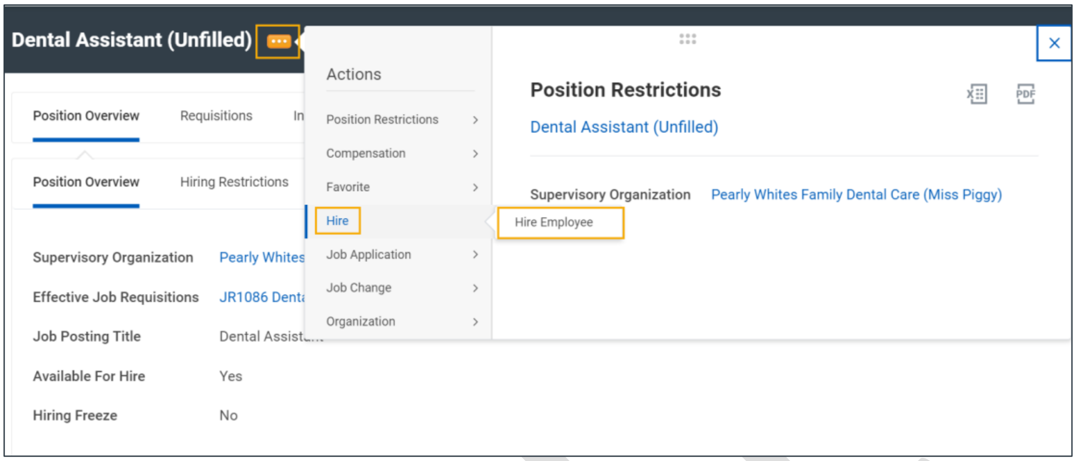
- Under **Org Chart**, select the unfilled position.



3

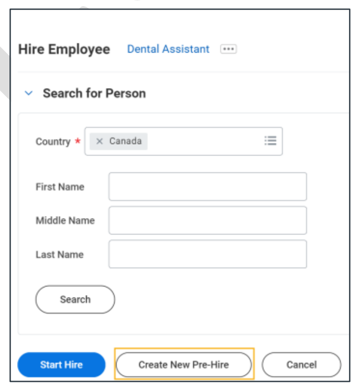
Talent: Hiring a Temporary Worker

- Click the related actions button ••• and select **Hire** from the primary menu and **Hire Employee** from the secondary menu.



4

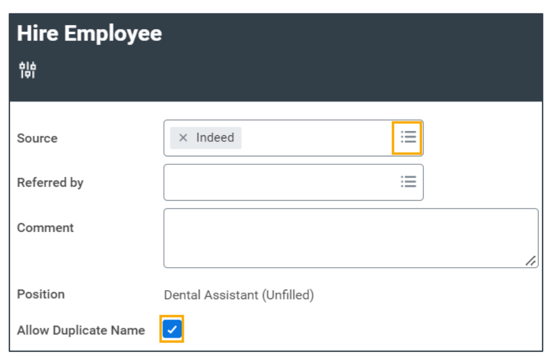
If you are..	Then …
Hiring an existing person	• Enter their information into the fields and click **Search** to locate the person and then **Start Hire**.
Adding a new person	• Click **Create New Pre-Hire**.



5

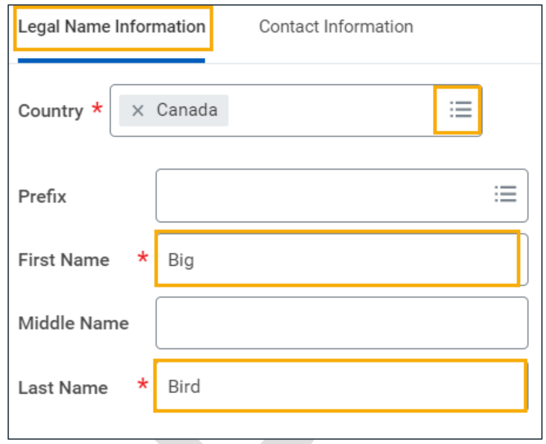
Under **Hire Employee** complete the following fields and click **OK**.

Fields	Description
Source *(optional)*	Select the prompt ☰ to search for the source of referral.
Referred by *(optional)*	Select the prompt ☰ to search for who the worker was referred by.
Comment *(optional)*	Add validating comments if applicable.
Allow duplicate name: *(optional)*	Check the box to allow for duplicate names.



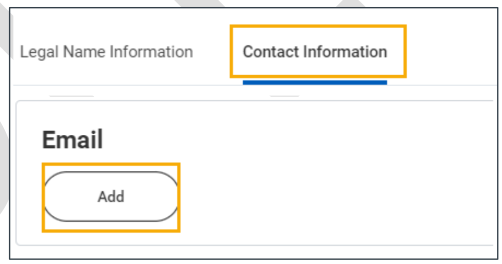
Under **Legal Name Information,** complete the following fields:

Fields	Description
Country*	Defaults to Canada.
Prefix	If it is a group practice, add additional locations.
First Name*	Choose either **employee** or **contingent worker**.
Middle Name	Click the prompt and choose the type from the list.
Last Name	Choose either **Full time** or **Part time.**

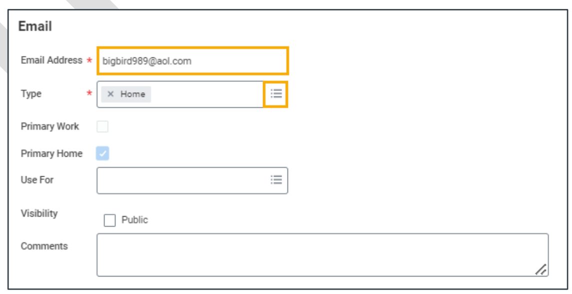


At the pre-hire stage, just an email is necessary.

- Click **Contact Information**
- Click **Add** under **Email**
- Complete the following fields and click **Ok.**



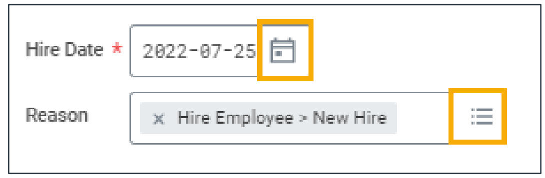
Fields	Description
Email Address*	Enter an email.
Type*	Select the prompt to choose **Home** or **Work**.
Primary Work/Primary Home	This will default depending on what type was chosen above.
Use For	Select the prompt to Enter either billing or shipping.
Visibility	Check the box for public visibility.
Comments	Enter comments as necessary.



- Review the information in the following screen and click **OK**.

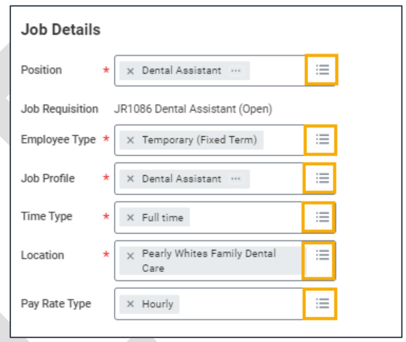
6

In the next screen of **Hire Employee**, complete the following:

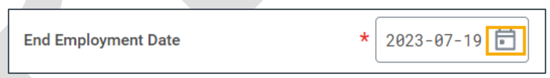


- Enter the Hire Date* or click the calendar to select the date of hire.
- Click the prompt to select a **Reason**.

In the **Job Details** section:

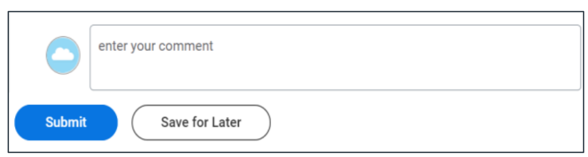


- Review and confirm that all required information is correct. If you have any questions, please contact your HR Business Partner to make any necessary corrections.



- Under **Additional Information**, confirm **End Employment Date**. If incorrect enter correct day or click the calendar and select the end employment date.

7



- **Submit** to send it for approval.
- **Save for Later** to save the information entered so that you can finish at another time.

MORE INFORMATION

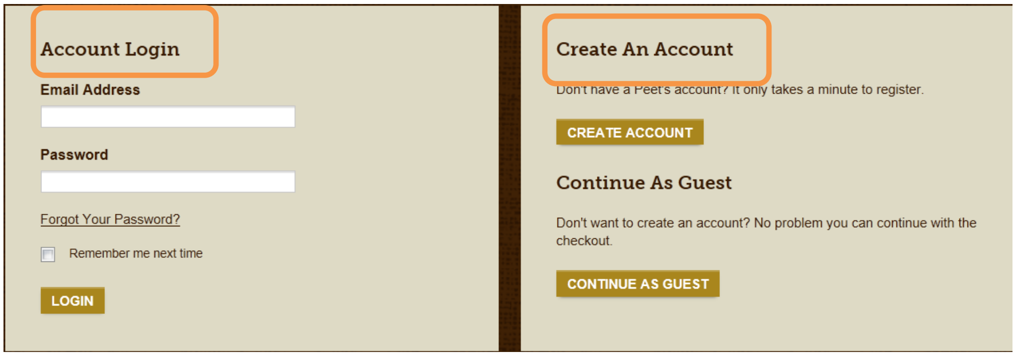
- Once you click **Submit**, you will receive a confirmation message and the request will be routed to the HR Business Partner for approval.

Customer Experience Quick Reference Guide

Logging In/Creating an Account: Whether they are a returning customer or a new customer, direct them to the upper right-hand corner to click **Sign In**.

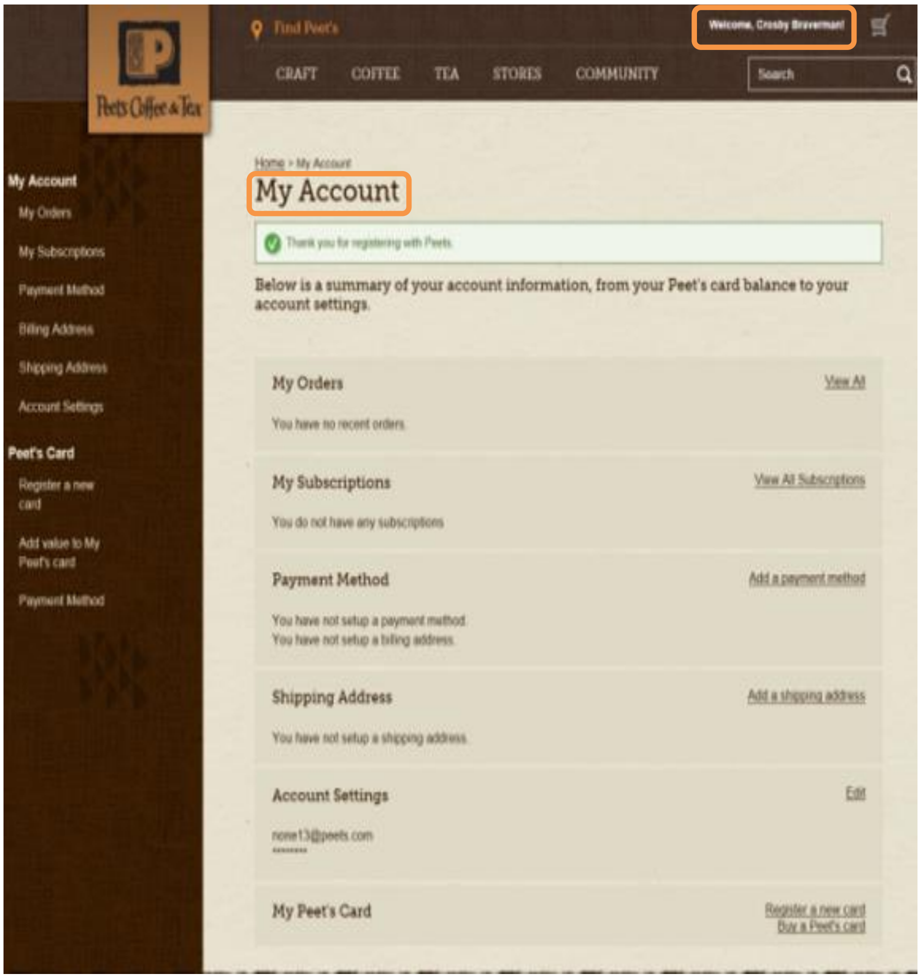
If they are a returning customer, they can sign in on the left-hand side of the screen under **Account LogIn** , using the email that they've signed up with and their password. They will then be taken to their **My Account** Page.

If they would like to create a new account, direct them to the right hand side of the screen to **Create An Account**.



Once they click **Create Account**, the next screen will ask them for First Name, Last Name, Email Address, Password (let them know the criteria**). They can uncheck the box at the bottom, if they would like to opt out of emails with news, events and special offers. Tell them to click Submit.

They will then be directed to their **My Accounts** page, where they can look at a summary of their account information. They will be able to check their past and current orders, view their subscriptions, add payment method (credit card or associate a Peet's Card), add billing and shipping address, edit their account settings (Name, Email and Password) and manage their Peet's Card. They can either make their selections from the left-hand side of the screen, or within the sections located in the middle.



Welcome: Shows the customer what account they are signed into.

My orders: view all orders placed on the account

My subscriptions: view all recurring deliveries on the account

Payment Method: add and edit a credit card or associate a Peet's card.

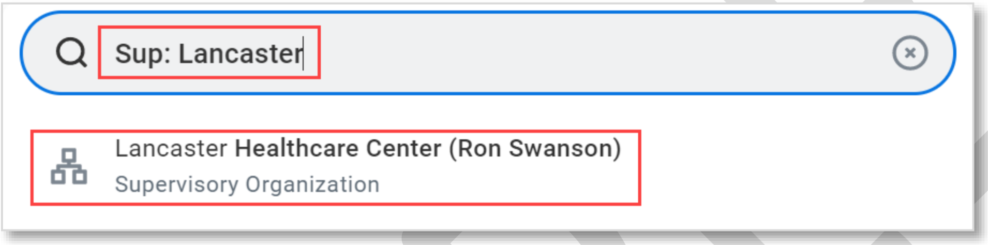
Billing/Shipping Address: view addresses associated with the account.

Account Settings: change name, email or password.

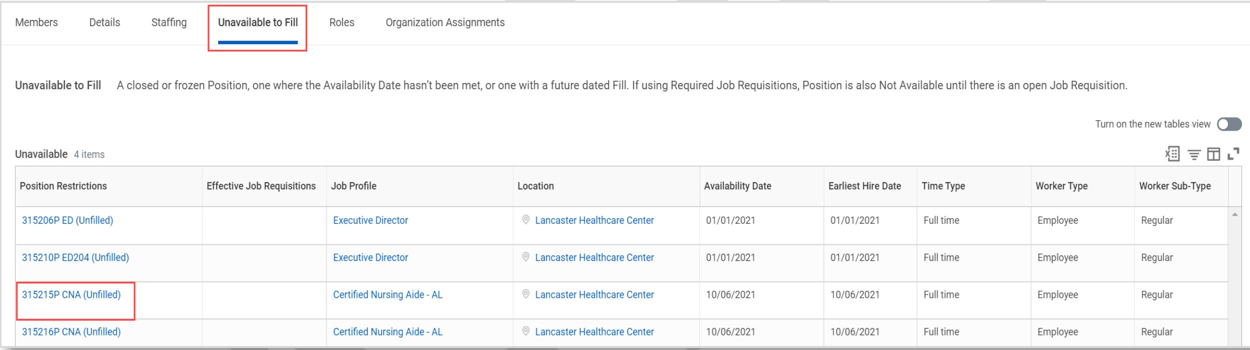
My Peet's Card: manage their Peet's card

Creating a Job Requisition

1. After the approvals of the new position have occurred, navigate back to your supervisory organization to create a job requisition by typing **SUP:** and the supervisory organization name in the **Search** field. Ex: SUP: Lancaster. This will bring up any supervisory orgs associated with your community. Select the appropriate choice from the list.



2. Select the **Unable to Fill** tab and locate the position from the Unavailable list.



Members | Details | Staffing | Unavailable to Fill | Roles | Organization Assignments

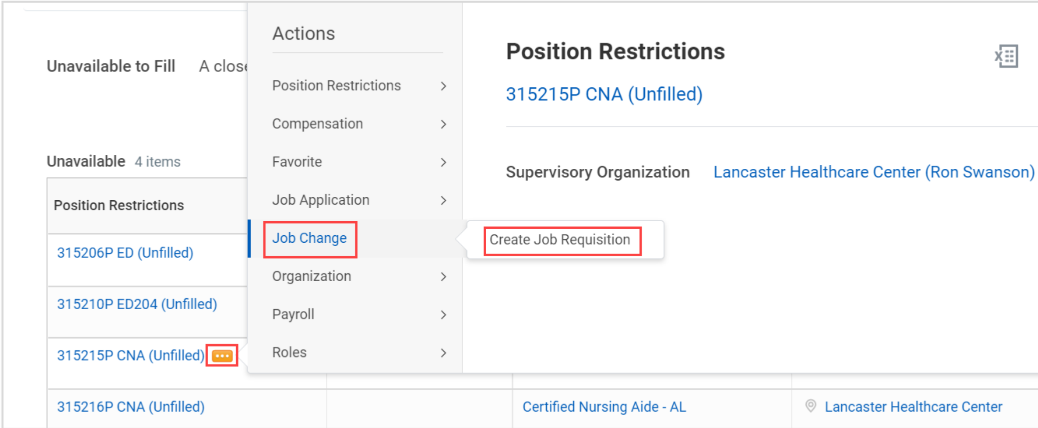
Unavailable to Fill A closed or frozen Position, one where the Availability Date hasn't been met, or one with a future dated Fill. If using Required Job Requisitions, Position is also Not Available until there is an open Job Requisition.

Turn on the new tables view

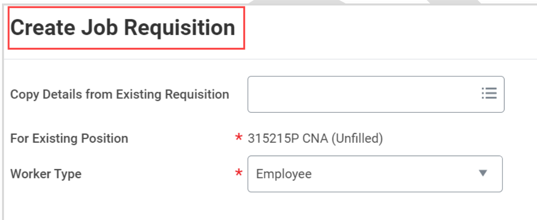
Unavailable 4 items

Position Restrictions	Effective Job Requisitions	Job Profile	Location	Availability Date	Earliest Hire Date	Time Type	Worker Type	Worker Sub-Type
315206P ED (Unfilled)		Executive Director	Lancaster Healthcare Center	01/01/2021	01/01/2021	Full time	Employee	Regular
315210P ED204 (Unfilled)		Executive Director	Lancaster Healthcare Center	01/01/2021	01/01/2021	Full time	Employee	Regular
315215P CNA (Unfilled)		Certified Nursing Aide - AL	Lancaster Healthcare Center	10/06/2021	10/06/2021	Full time	Employee	Regular
315216P CNA (Unfilled)		Certified Nursing Aide - AL	Lancaster Healthcare Center	10/06/2021	10/06/2021	Full time	Employee	Regular

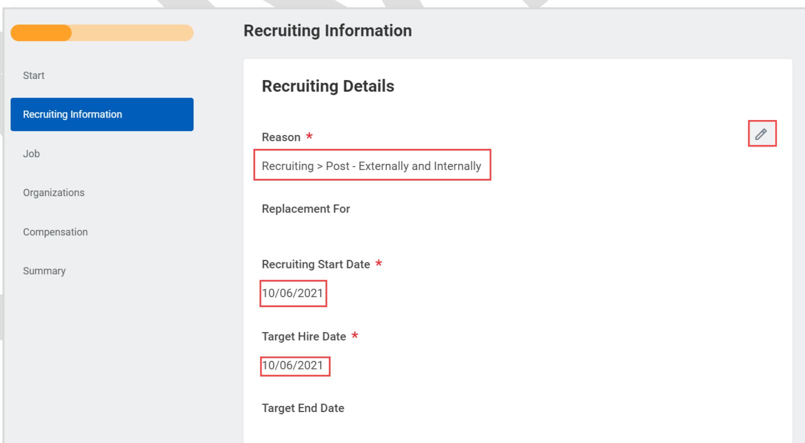
3. Select the actions button next to the position and **Job Change** from the primary menu and **Create Job Requisition** from the sub-menu.



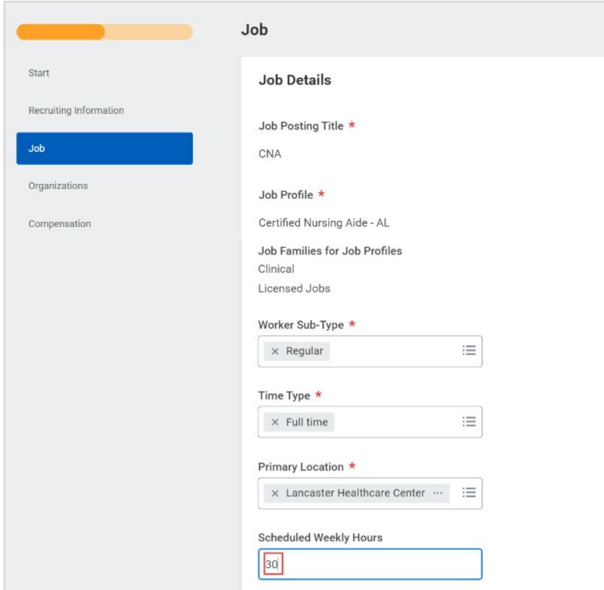
4. In the **Create Job Requisition** screen, check that the information is correct and click **Ok**.



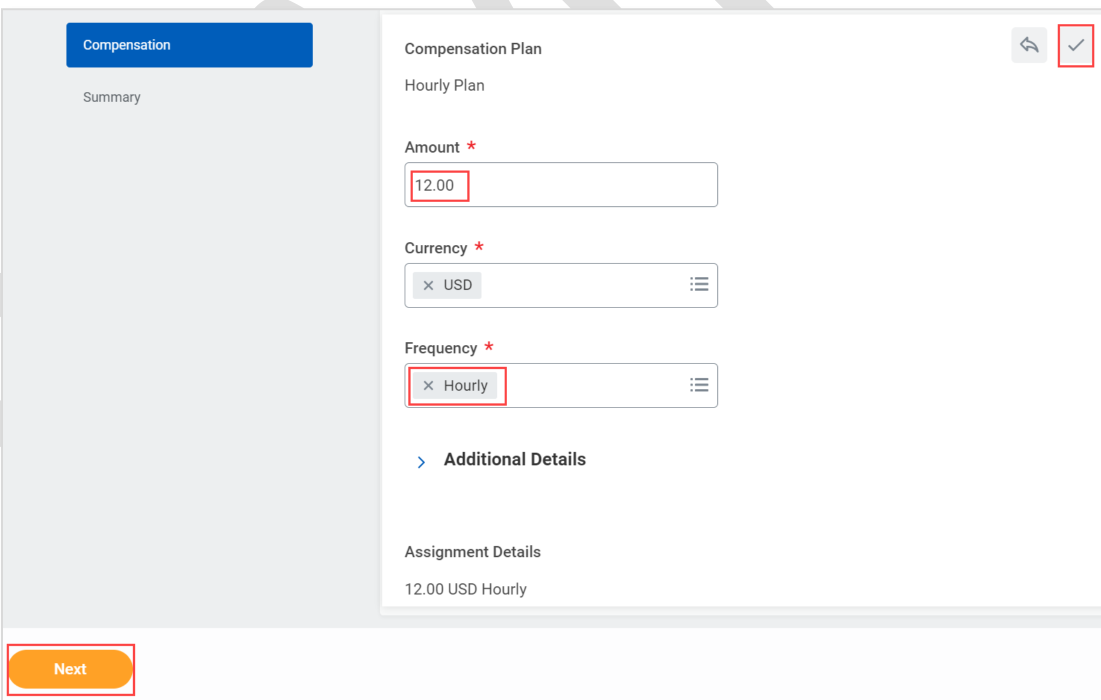
5. In the **Recruiting Information** screen, select the pencil next to **Reason** field and select the reason. **It is recommended that you always choose External and Internal Posting as the selection.** Enter in the **Recruiting Start Date** and **Target Hire Date** and click **Next.**



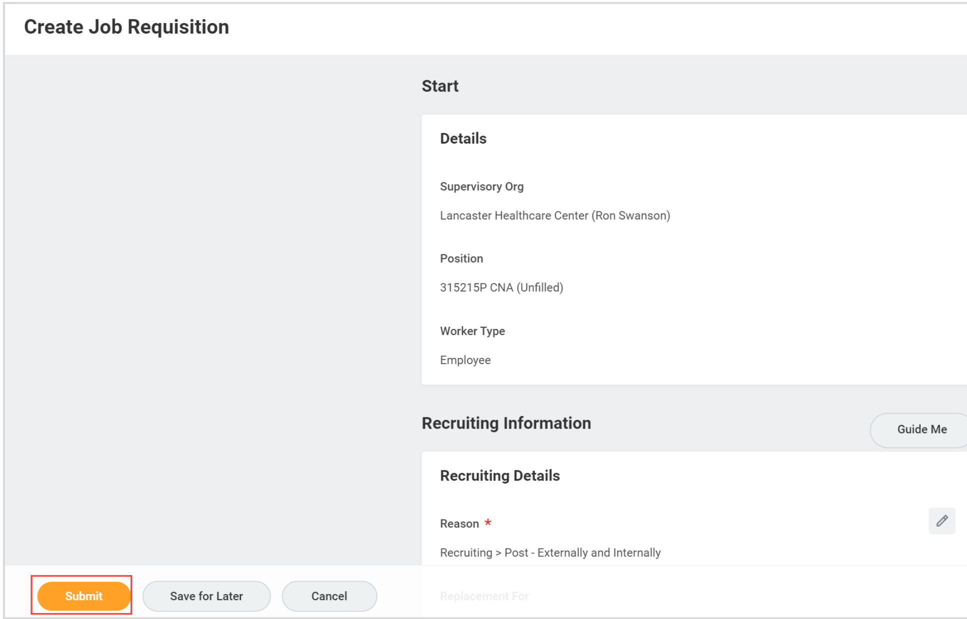
6. The **Job** details screen will pre-populate. If you need to make edits to the Scheduled Weekly hours as this defaults to 40, click into the field and type the number of hours. Click **Next**.



7. Review the **Organizations** screen and click **Next** if everything is correct.
8. On the **Compensation** screen, select the pencil next to the **Amount** to add the hourly rate, if that is how the position is paid. Check the frequency and click the check mark and **Next** when complete.



9. Review all the information on the last screen, select the pencil icon next to the entry if anything needs to be changed. Click **Submit** when complete.

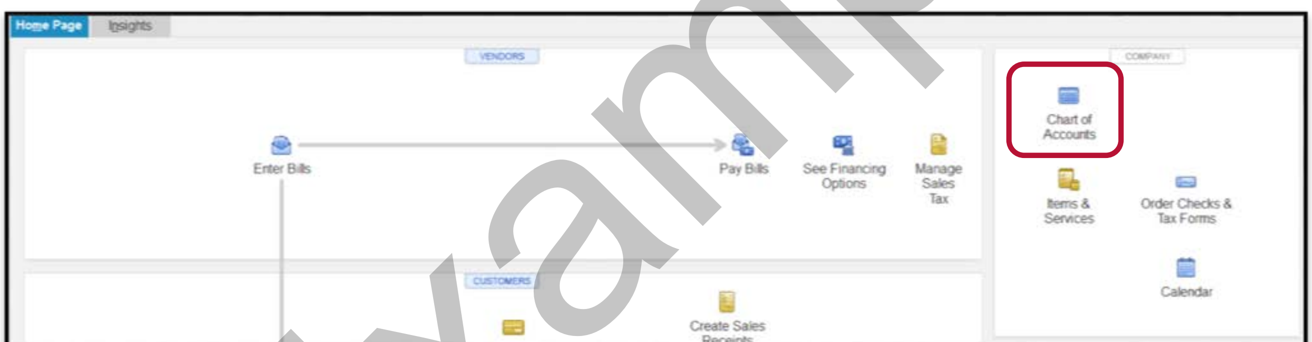


Setting Up Your Accounts for the First Time

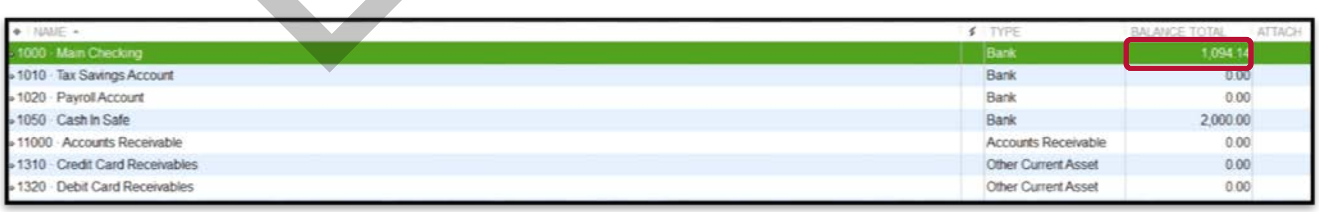
You will receive your asset list and your loan invoice from GOI accounting approximately 2 weeks after your store opens. Using the Changeover Report you'll need to update the following 6 fields in the Changeover Balances screen with the numbers for your store:

a. Deposits
b. Cash in Safe
c. Supplies
d. Notes Payable
e. Equipment
f. Owner Contribution

2. To get started, Click the **Chart of Accounts** icon on the home page.

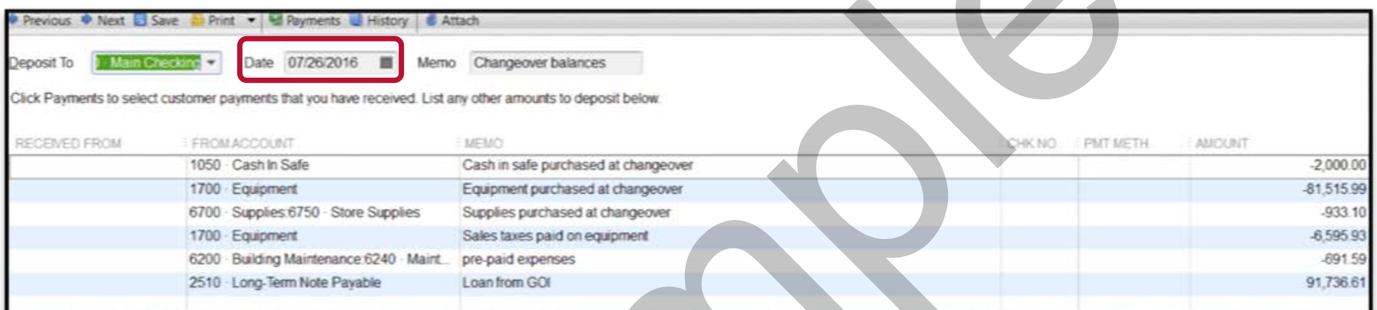


3. Locate the **1000-Main Checking** row and double click in the **Balance Total** column.

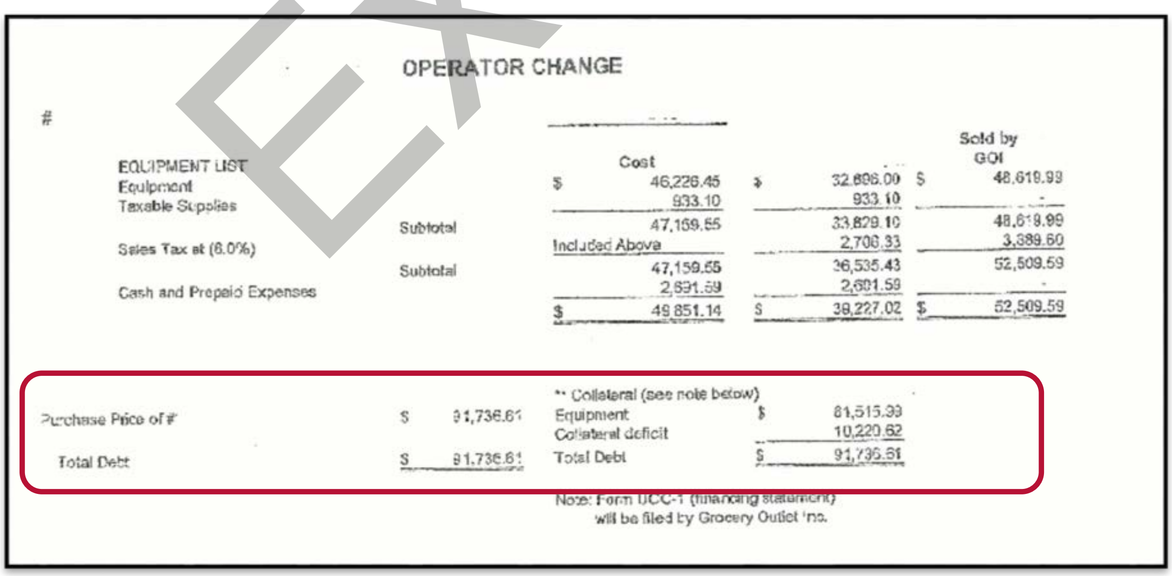


4. Double click in the **Balance** column in the **Changeover Balance**s row.

5. Edit the date that you took ownership of the store by either typing the date into the **Date** field or clicking the calendar icon in the **Date** field and choosing the effective date.



6. Select each number in the **Amount** field and type the new numbers from the **Changeover Report** to replace them. Please note that Cash and Prepaid Expenses are included under one lump sum. You'll need to separate the Cash in Safe from the Pre-paid Expenses, and record them accordingly in the Cash in Safe # 1050 and Building Maintenance, subaccount # 6240.



OPERATOR CHANGE

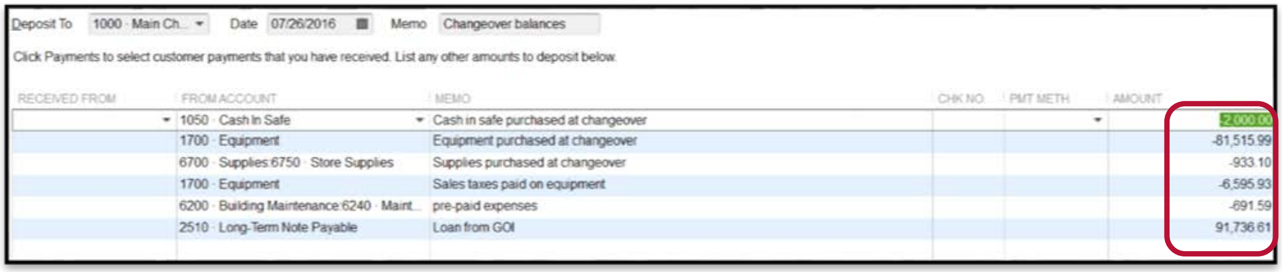
#

		Cost		Sold by GOI
EQUIPMENT LIST				
Equipment		$ 46,226.45	$ 32,896.00	$ 48,619.99
Taxable Supplies		933.10	933.10	-
	Subtotal	47,159.55	33,829.10	48,619.99
Sales Tax at (6.0%)		Included Above	2,706.33	3,889.60
	Subtotal	47,159.55	36,535.43	52,509.59
Cash and Prepaid Expenses		2,691.59	2,691.59	-
		$ 49,851.14	$ 39,227.02	$ 52,509.59

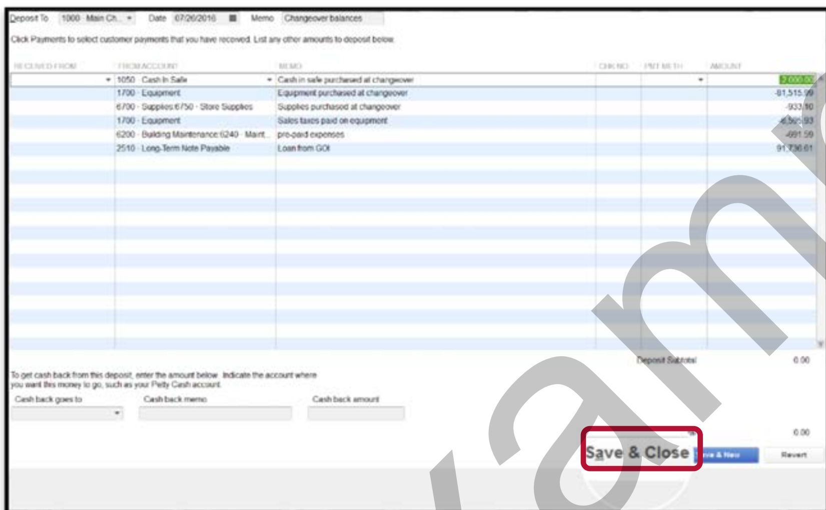
		** Collateral (see note below)	
Purchase Price of #	$ 91,736.61	Equipment	$ 81,515.99
		Collateral deficit	10,220.62
Total Debt	$ 91,736.61	Total Debt	$ 91,736.61

Note: Form UCC-1 (financing statement) will be filed by Grocery Outlet Inc.

➢ *Note: Assets are negative numbers and the loan will be entered as a positive number.*



7. Click **Save & Close** once all entries have been updated.

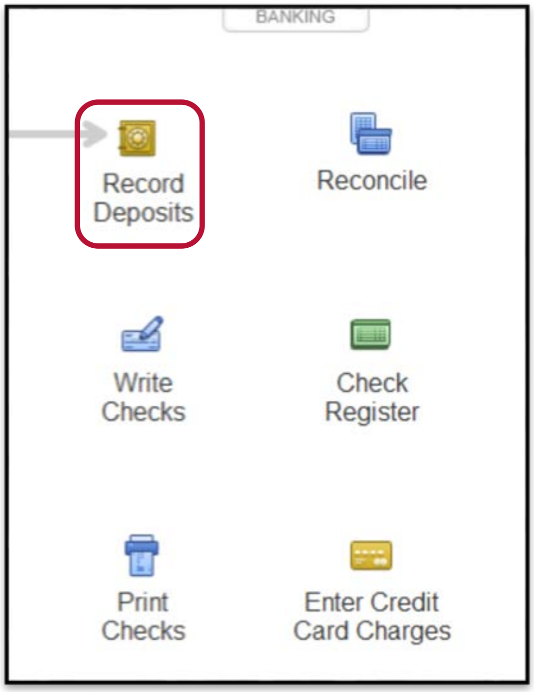


Entering Personal Contributions

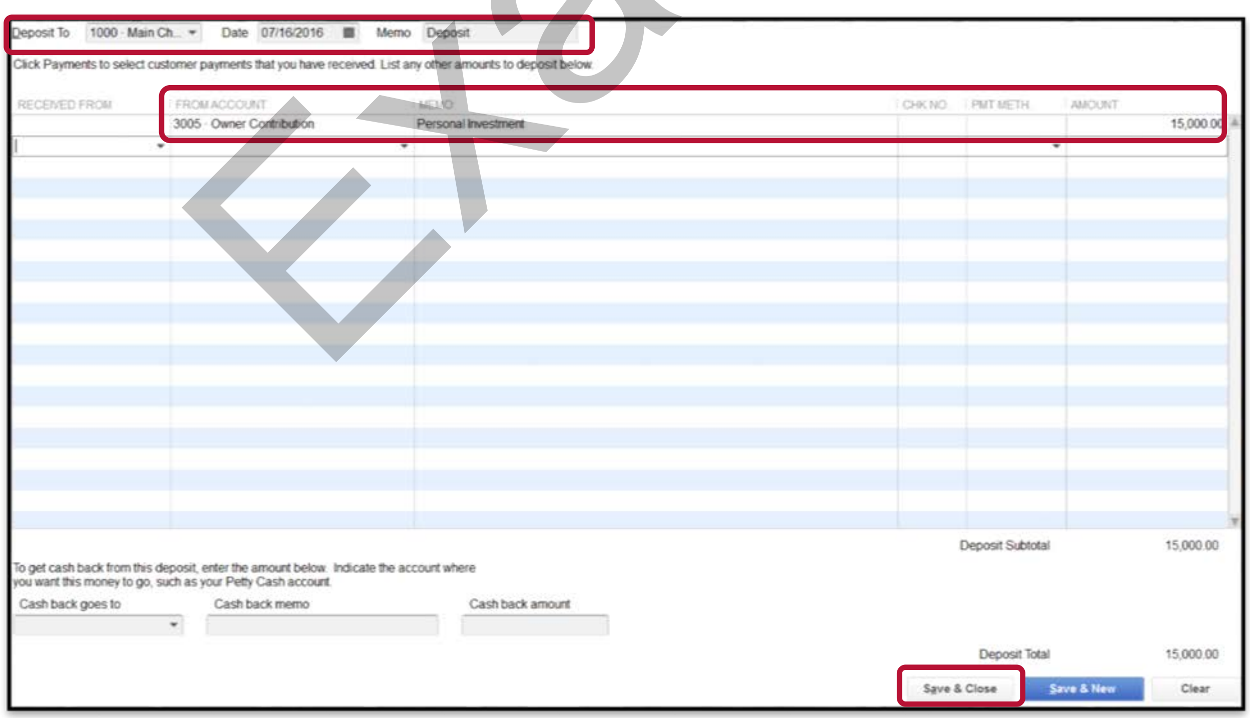
Personal contributions are expenses related to corporate filings, travel and any other out of pocket expenses incurred before changeover.

You should also record your personal investment toward your new business. Record it as a deposit. For this training you'll need to record a $15,000 deposit.

1. Click the **Record Deposits** icon on the home page.

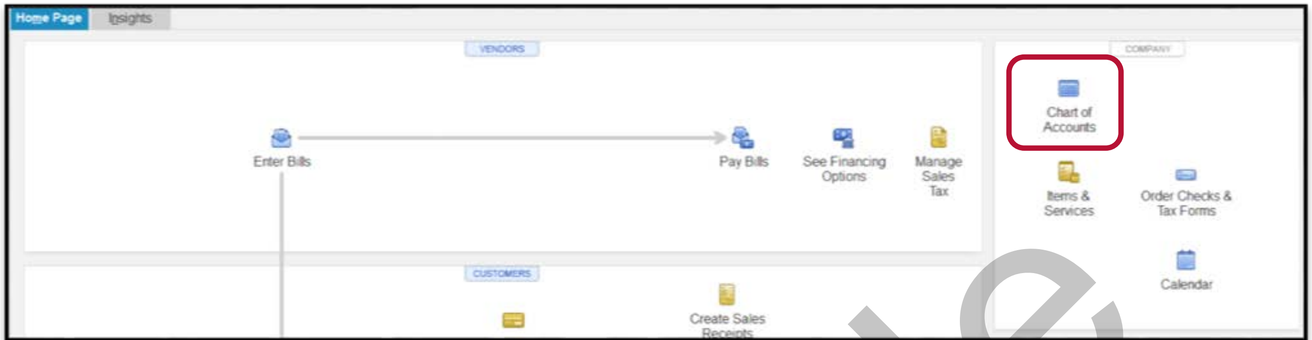


2. Select **Main Checking Account** under Deposit To field. Enter the date **7/16/16** in the Date field. Type **"Owners Contribution #3005"** in the FROM ACCOUNT field and it will populate the account. Type **Personal Investment** in the MEMO field. Enter the **$15,000** under the AMOUNT field. Click **Save & Close.**



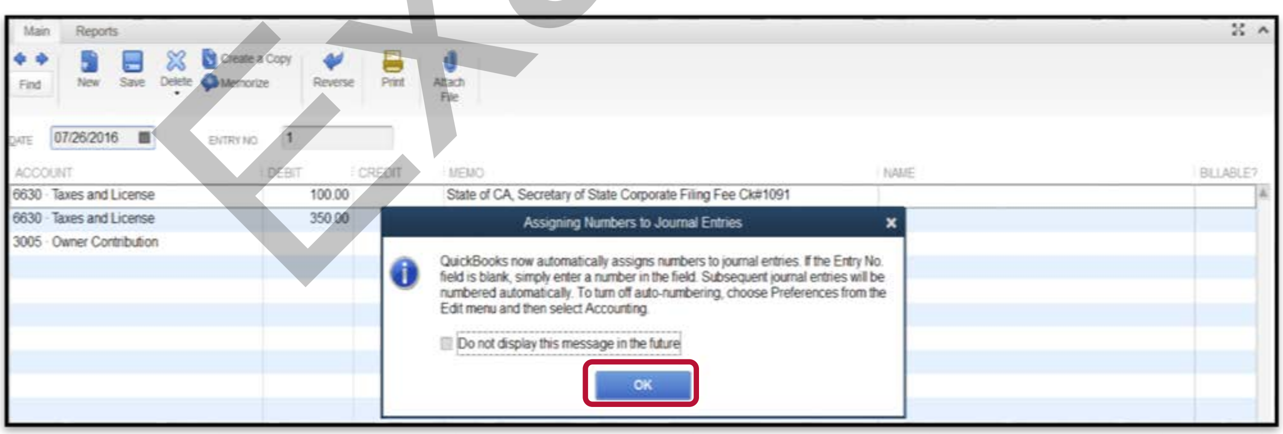
Recording Expenses

1. To record expenses, click the **Chart of Accounts** icon on the home page.



2. Locate the **3005-Owner Contribution** row and double click in the **Balance Total** column.

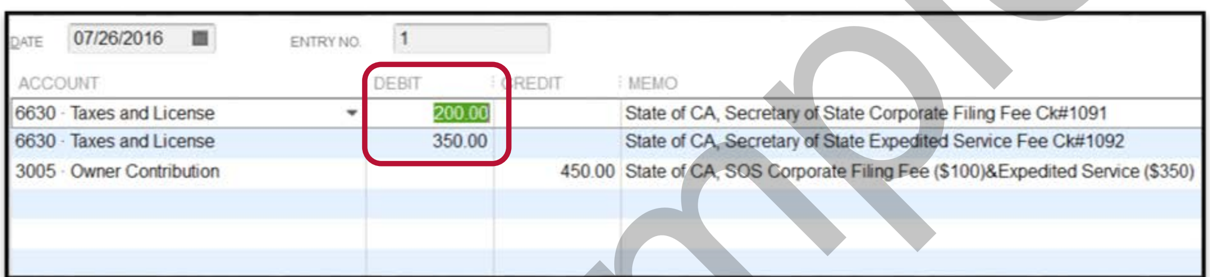
3. Double click on the sample transaction. A pop-up window appears informing you that QuickBooks automaticallly assigns numbers to journal entries. Click **OK** to close the window.



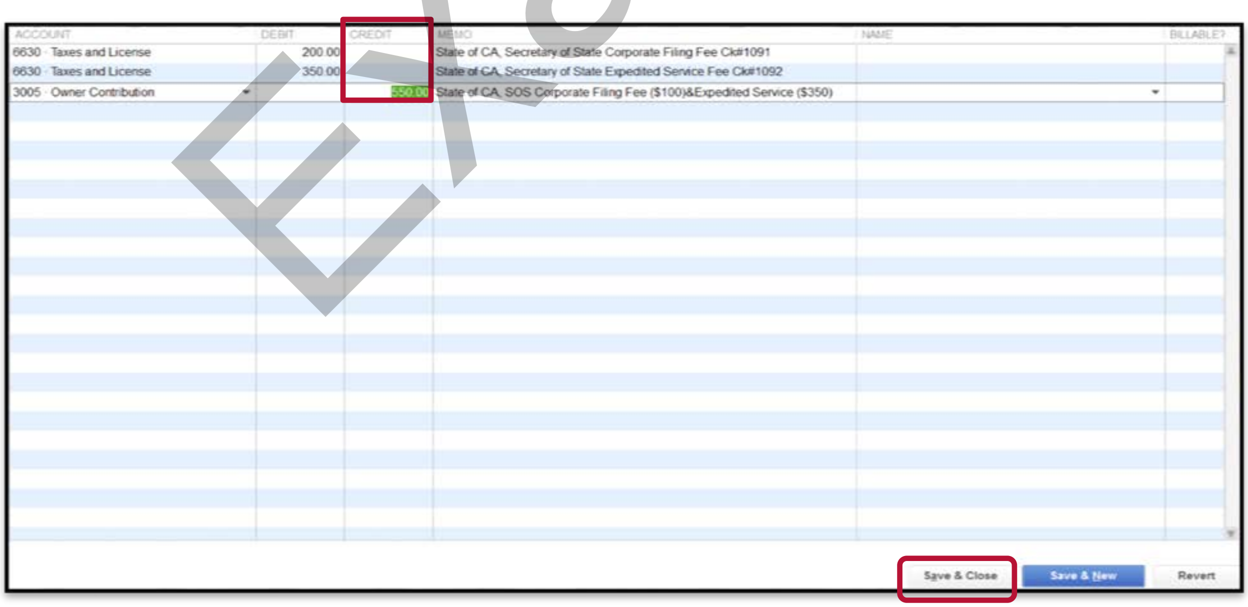
4. Update the date in the **DATE** field to your business open date.

5. To make a change to an amount, select the amount in the **Debit** column and type the new amount.

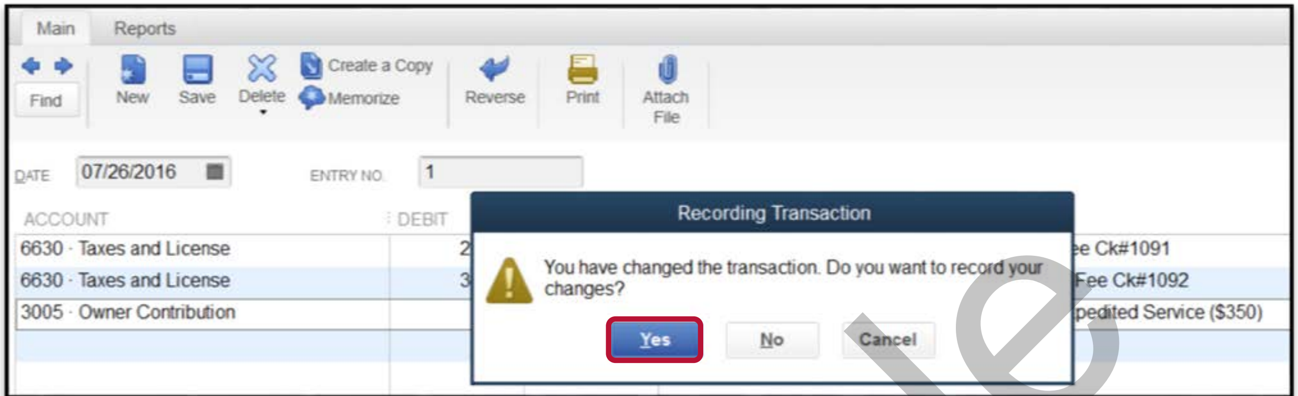
➢ *Note: When adding new expenses you need to make sure that the Debits equal the Credits. This balances your journal entry.*



6. Next, you'll need to update the **CREDIT** column to reflect the **DEBIT** column. Select the amount in the Credit column and type the new amount. Click **Save & Close** to save your changes.



7. A Recording Transaction pop-up window will inform you that you have changed the transaction and asks "Do you want to record your changes?". Click **Yes** to continue.

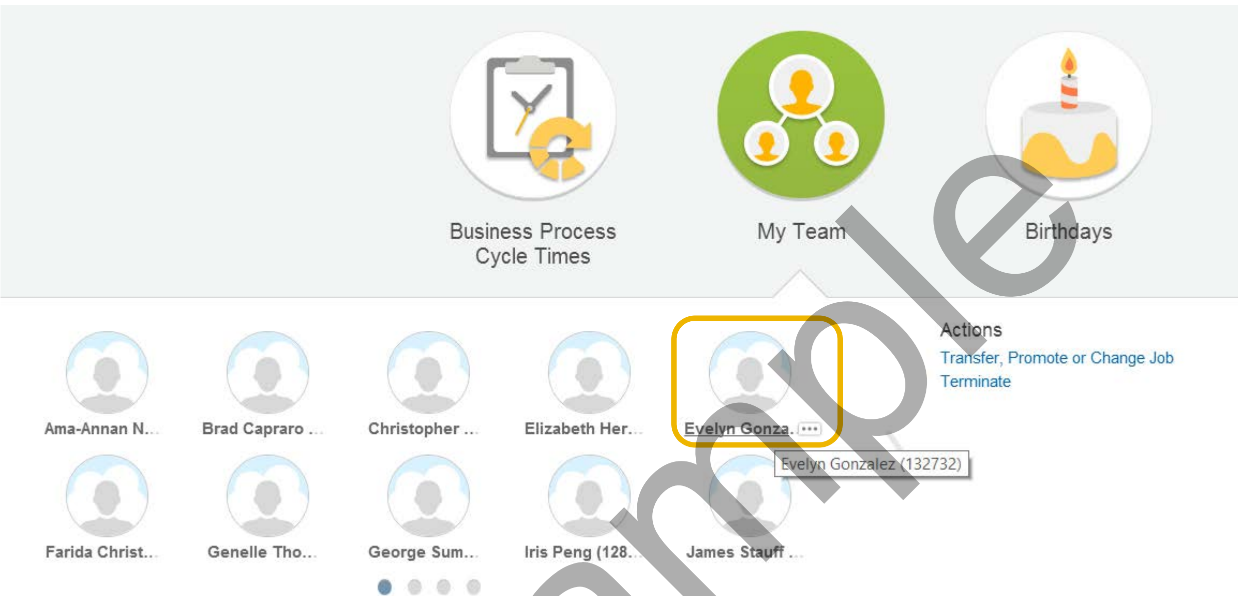


Changing Compensation

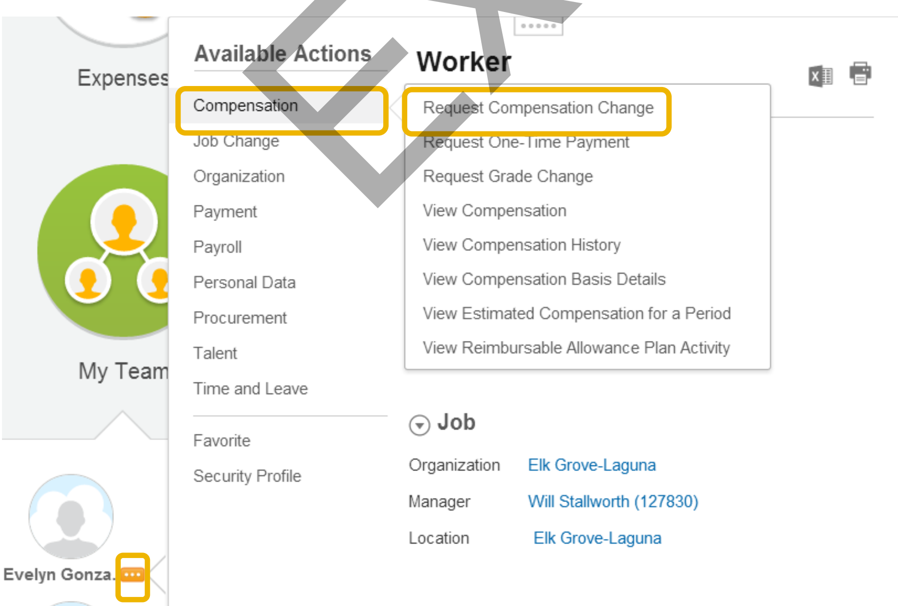
After reviewing this material you will be able to change compensation.

- Note: Does not apply to Insurance Agents, Life Insurance Agents or Travel Counselors.

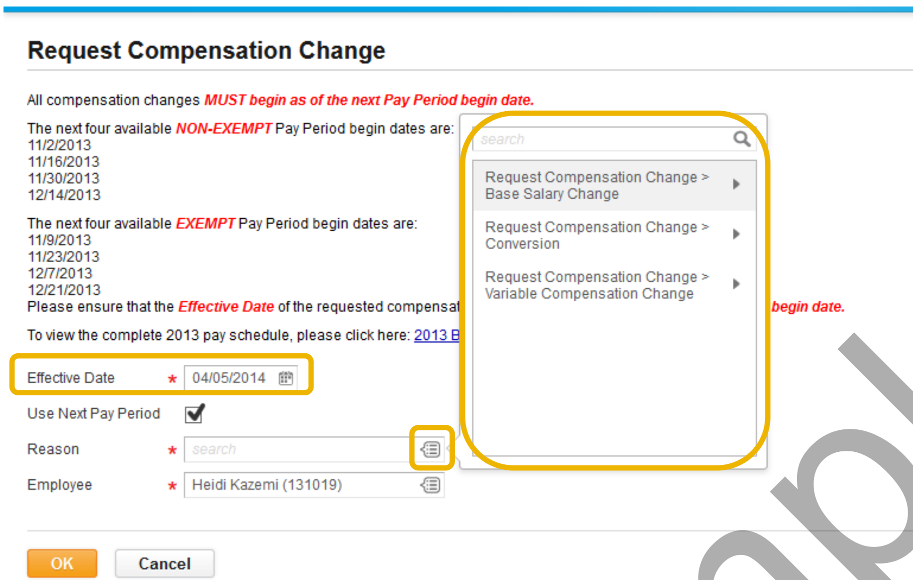
1. Log-into Workday. Navigate to **My Team**. Locate the employee that you need to change compensation for.



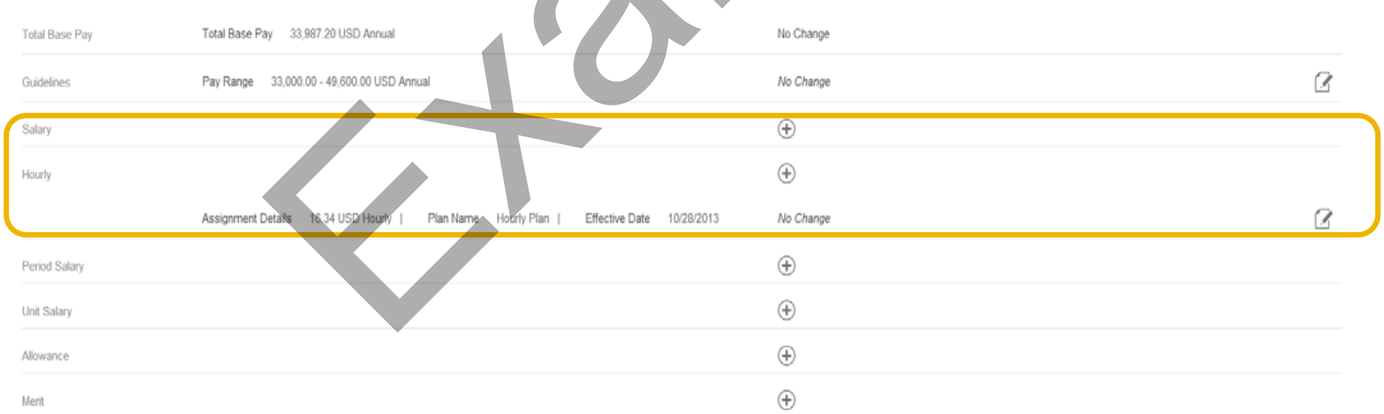
2. Select the **Related Actions** icon to the right of the employee name. Select **Compensation** and **Request Compensation Change** from the **Available Actions** menu.



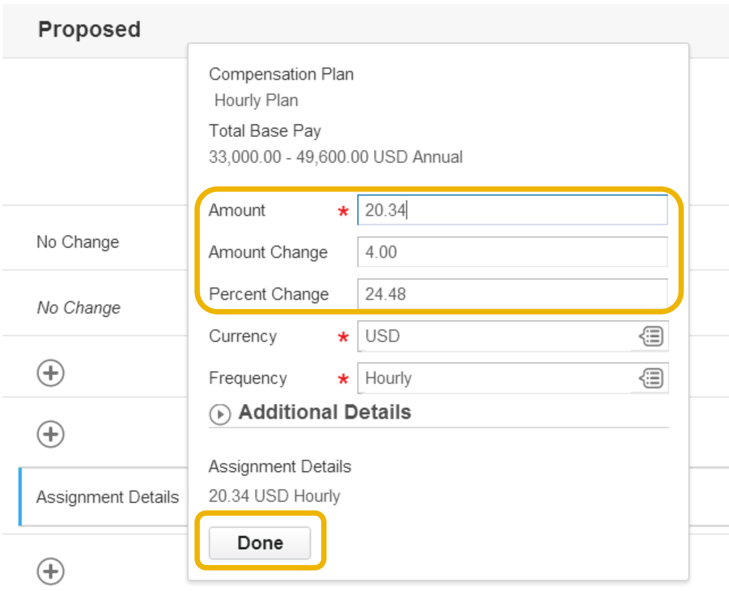
3. The system will default the effective date to the first day of the next available payroll. No other date should be selected without consulting HR. Select the **Prompt** icon from the **Reason** field to display the **Reason** sub menu. Choose a reason from the sub menu and click **OK**.



4. Select the **Edit** icon at the end of the **Hourly or Salary** row under the proposed column as appropriate. Only make changes to this pay rate section.

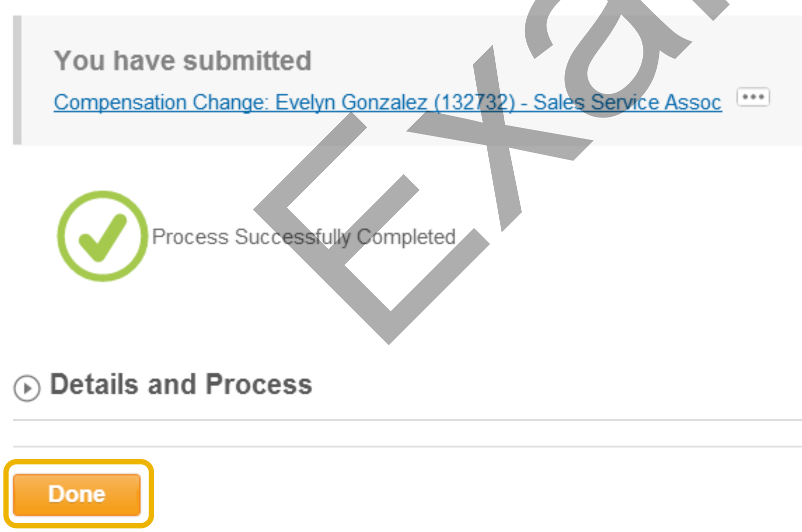


5. Enter the new amount into the **Amount** field. Or enter amount to be changed into the **Amount Change** field, depress the tab key and the system will calculate the new rate accordingly. Or enter the percent change into the **Percent Change** field. Click **Done** when finished.



6. Provide details supporting the change in pay in the **Comment** field. Click **Submit** when finished. Choose **Save for Later** or **Cancel** as needed.

7. A "Process Successfully Completed" notification displays. Click **Done** to exit.



6 Steps of Data-Driven Decision Making

1 **Step 1**
Define Objective

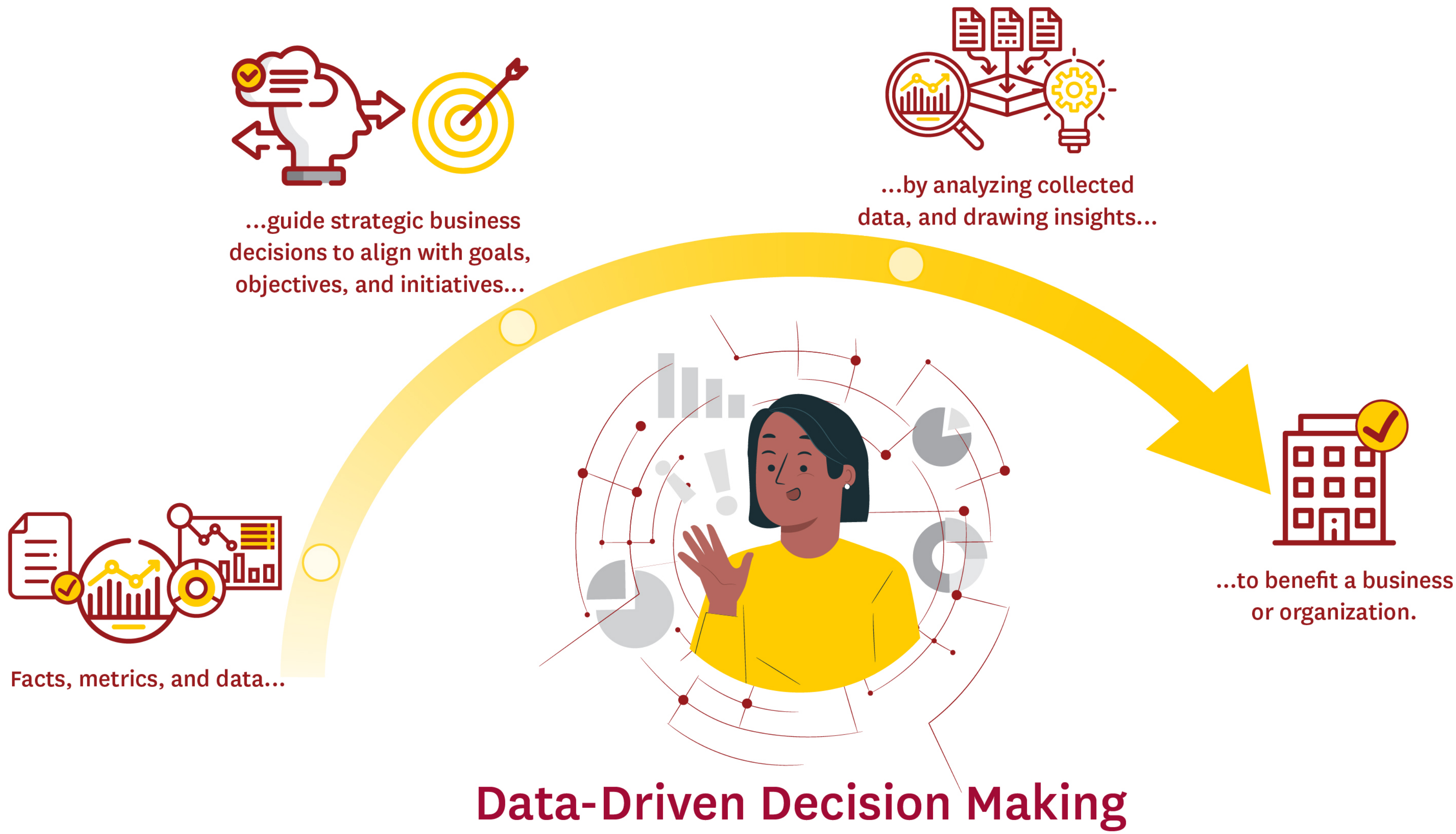
2 **Step 2**
Establish Hypothesis

3 **Step 3**
Collect, Organize & Validate the Data

4 **Step 4**
Summarize & Analyze Information

5 **Step 5**
Synthesize & Prioritize Knowledge

6 **Step 6**
Decide, Create Story & Implement



Facts, metrics, and data...
...guide strategic business decisions to align with goals, objectives, and initiatives...
...by analyzing collected data, and drawing insights...
...to benefit a business or organization.
Data-Driven Decision Making