

Department of Administrative Services



Workday Case Management | Class & Comp

Agenda

1. Enterprise Rollout Overview
2. Process Map
3. Overview- Submitting Directly to DAS
4. Overview- Rerouting Agency Cases



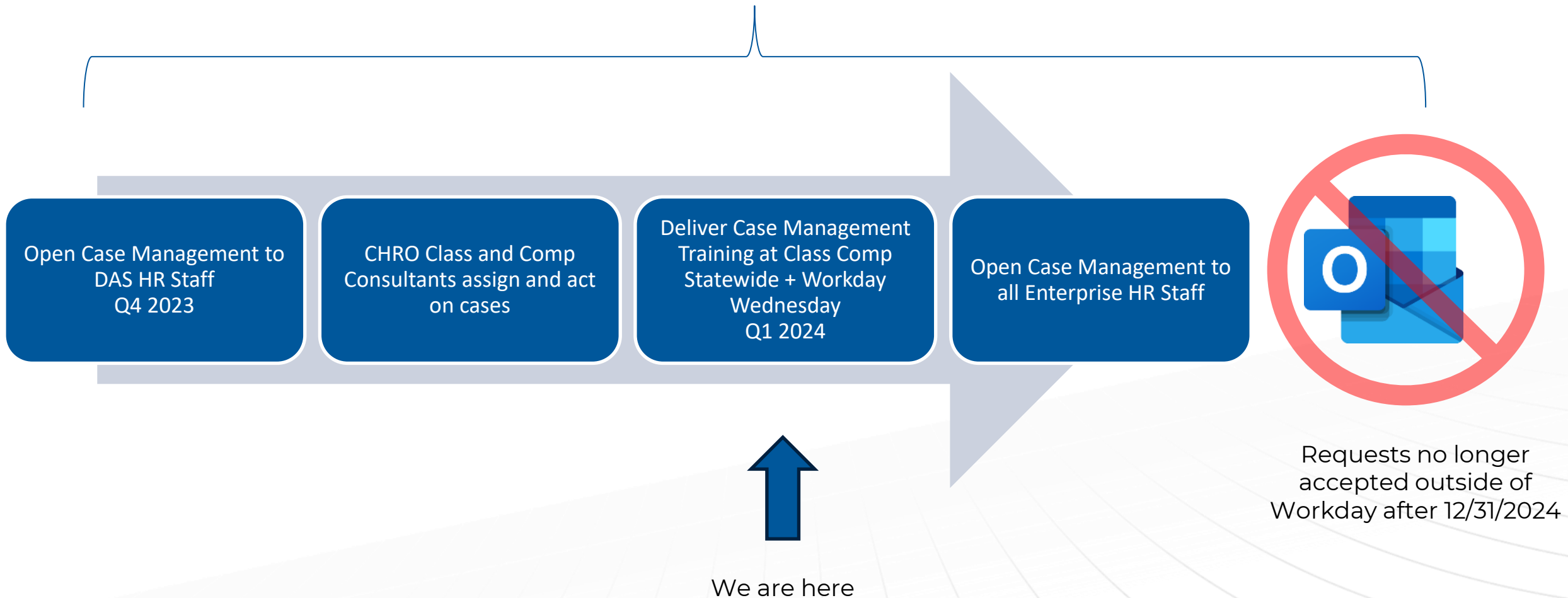
Rollout Overview





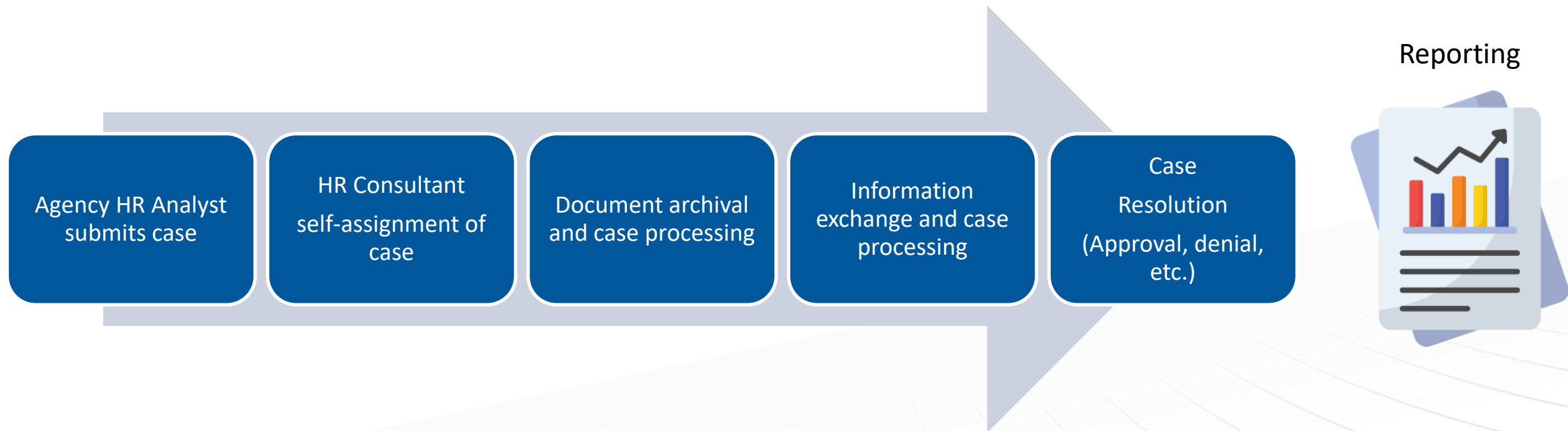
Workday Case Management Rollout Overview

Accepting requests through email & concurrently tracking in Sharepoint





Case Management Workflow

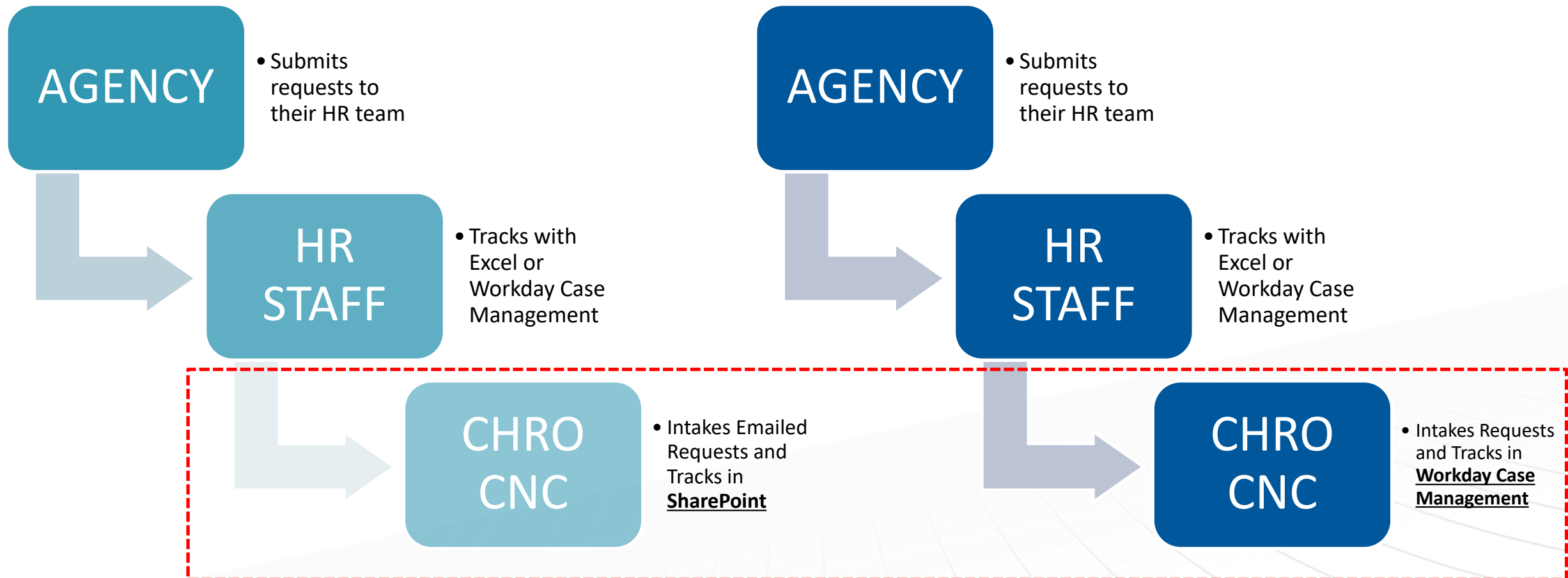


Customer Overview





What is changing?



Prerequisites & Methods of Submitting Requests to DAS CNC



There are two ways Workday Case Management (WD CM) can be utilized for DAS Class & Comp (CNC) request submissions.

Workday *Case Solver* roles and a *Help Case Workspace* is needed to facilitate the routing. **All agencies have a workspace in-waiting if they have not activated it yet.** Please work with your leadership to get role requests to Workday Oregon.

Option #1 (PREFERRED) - Agencies create requests directly to DAS Class & Comp from their *Help Case Workspace*.

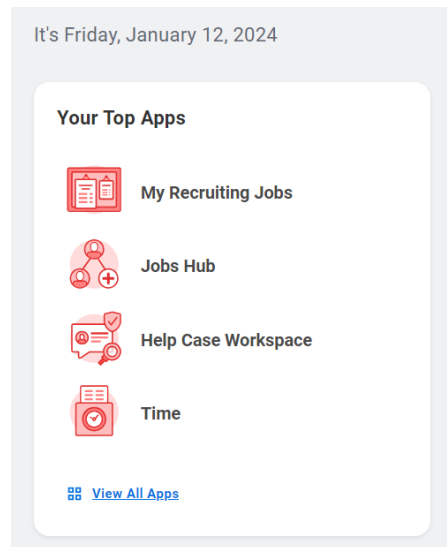
Option #2 - Agencies use WD CM to route requests internally to their HR Class & Comp team from other HR staff. The same case is used from downstream origination through resolution at DAS CNC.



Option #1- Originating Requests from Help Case Workspace

1

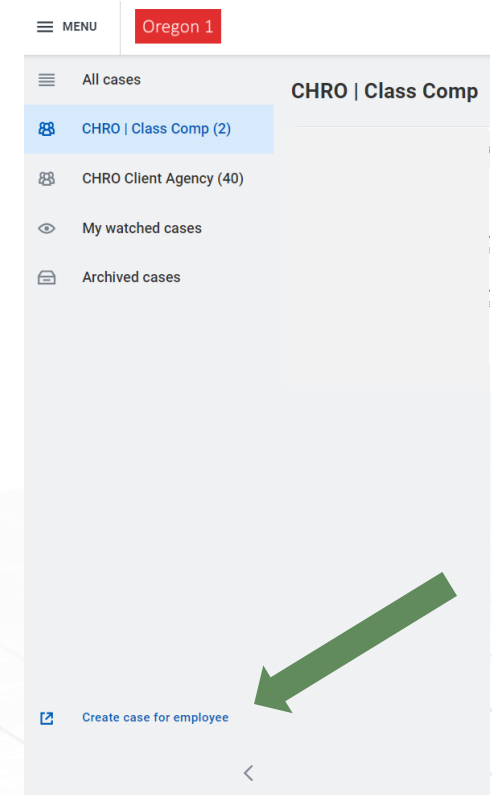
Start by navigating to the Help Case Workspace within your WD dashboard.



2

From there, you will see your Agencies queue with any cases that are currently live.

In the bottom left corner, you will have the option to **“Create case for employee.”** Please click that to get started.





Option #1- Required Template

- **Title Line Naming Convention:**
 - “Action Item Type, (WD/PPDB ID), (Incumbent or Classification if Vacant)”
- **Detailed Message Text Field Template:**
 - Action Item Type:
 - Agency
 - Requested by/ Supervisor
 - Workday Position Number (“TBD” if unavailable)
 - PPDB Position Number (“TBD” if unavailable)
 - Current Classification
 - Proposed Classification
 - Case to be shared with:

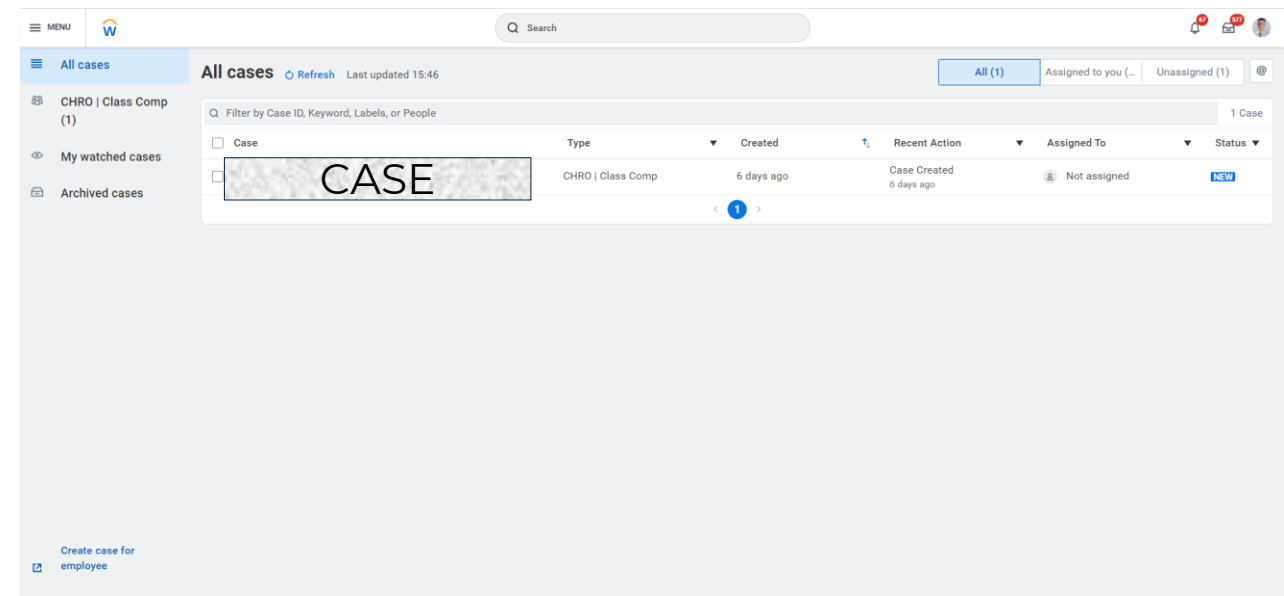
The screenshot shows a 'Create Case (Advanced)' dialog box. It has a title bar with a close button. The main content area is divided into several sections: 'Created for' with radio buttons for 'Worker' (selected) and 'External', and a search box showing 'No Items.'; 'About' with a text input field; 'Case Type' with a dropdown menu; 'Title' with a text input field; and 'Detailed Message' with a large text area. At the bottom, there is an 'Attachments' section with a dashed border, containing the text 'Drop files here', 'or', and a 'Select files' button. At the very bottom of the dialog are 'OK' and 'Cancel' buttons.

Cases cannot be created about vacant positions, use Case Solver (Agency CNC Staff) as Worker if necessary



Option #1- Monitoring Submitted Cases

- Monitor & Respond from the *Help Case Workspace*
- Click on the case to open it up and interact with the person assigned to assist you.
- Messages between you and the Case Solver will appear in this space.
- Send messages to the HR Consultant as necessary while the case is being processed.



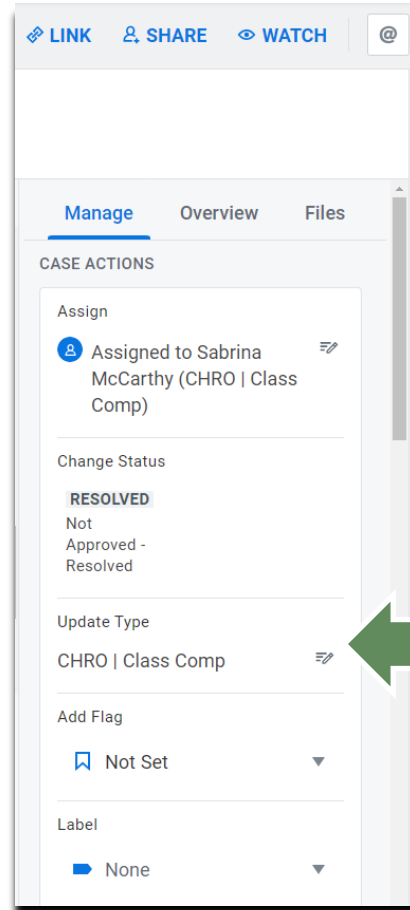
Option #2- Routing a Case From Agency HR Staff to DAS CNC



1

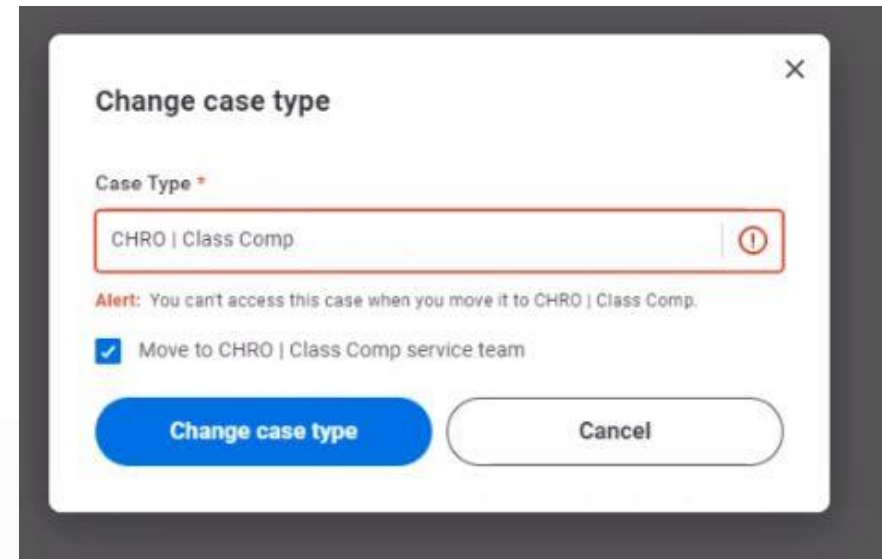
The first step is to select **“Update Case Type”** to send your case to the DAS CNC team for review.

Note: The same template is required (request details). Add it to the case if necessary.



2

Search for **“CHRO | Class Comp”** in the drop-down menu. Please note that as you confirm you are changing the case type, your agency no longer has visibility to the case. It will be in DAS CNC queue waiting for a Consultant to pick it up.



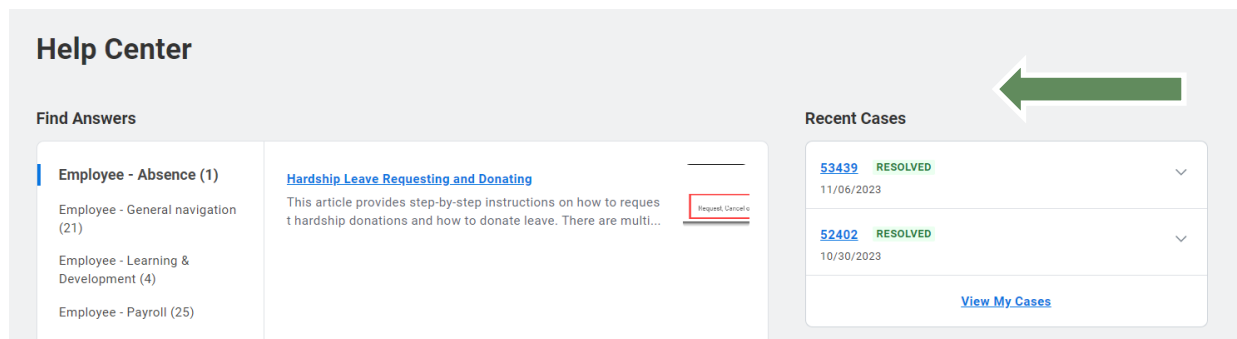


How to view cases once routed (Option #2)

3

Navigate to your **“Help Center”** in Workday to view your submitted case history.

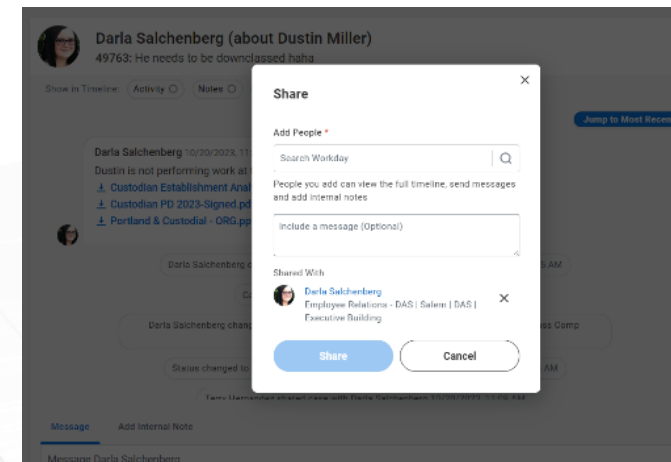
- Within the Resolved case, an Agency Class & Comp Analyst will find the approval memo attached and can download it for their records.



4

Once the case is routed to DAS CNC, our Consultants have the option to **“Share”** the case and add an Agency Class/Comp Analyst to be able to follow along with the Class Review that was just submitted.

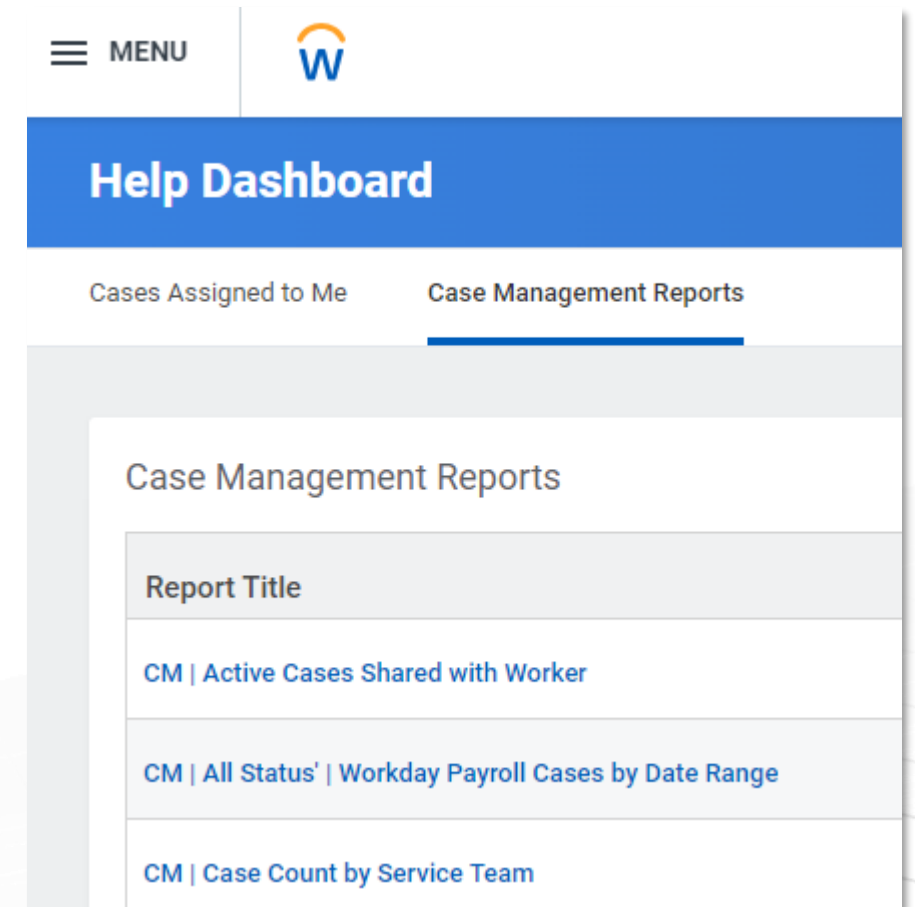
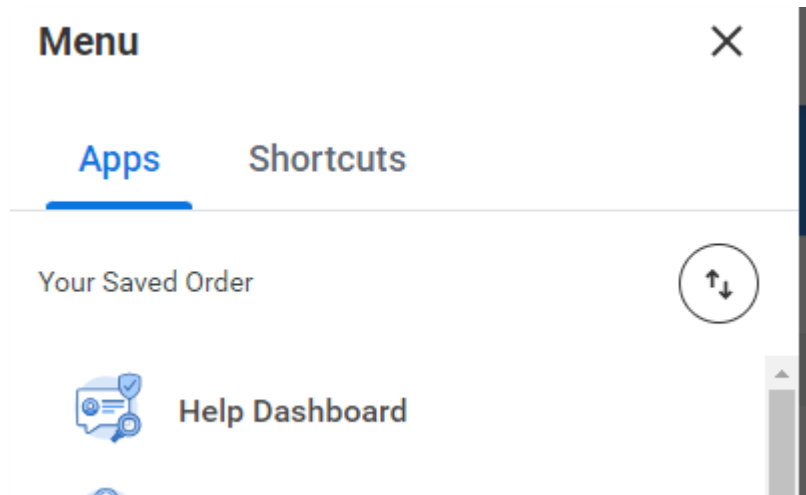
i.e., Agency Analyst is on Vacation and will have another analyst as a back-up.



Reporting



- Other Case Management Reports are available in Help Dashboard
 - Add to your apps if not already visible in App Menu



Case Solver Resources

[DAS - WD - Case Management Overview](#)

[Solver Perspective: Working with Your Cases](#)

[Who should be a Case Solver in Workday?](#)

[Solver Perspective: Getting to Know Case Management](#)

[Case Types for Workday Help/Case Management](#)



Case Management

Contact information:

- DAS CHRO Classification & Compensation Team
- chro.cnc@das.oregon.gov
- <https://www.oregon.gov/das/HR/Pages/cc.aspx>

