Personnel Board
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Workday Security Role Authorization

The Workday Security Role Authorization form (page 3 of this document) is to be used to designate employees within your Merit System agency you wish to have access to certain employment records and/or to allow to perform various business processes within Workday. Access to view certain employment records and perform various business processes is dictated by the security role that you authorize for a given employee's position; therefore, it is important that you understand the access being provided by the given security role assigned to the position. It is also important to note that the security role will be applied to the position, rather than the employee; so, the employee occupying the given position will inherit the security rights assigned to that position. If an employee is moved from that position into another position, then the security rights will not follow him/her to the new position. If you wish for that employee to retain those security rights, then you will need to complete this form for the new position held by that employee. Also, an employee who is the successor to a given position with defined security rights will inherit the rights associated with that position unless you contact the Personnel Board to inform us to remove those security rights.

Because different security roles will provide different rights to access, it is important that you understand the security role(s) that you are assigning to a position. Please review the Workday security role descriptions located on page 2 of this document before requesting access. An employee may be assigned *more than one* security role depending upon your needs and desired processing flow. Please select *all* roles that you wish to have assigned to the employee position.

Additionally, for each security role you need to determine whether you wish for the security role access to be for only the positions within the employee position's organizational structure chain (i.e., their department or unit) or for all positions throughout the organization. For example, you may wish to have an employee position within HR submit requests for certifications within Workday for positions in the entire organization. If so, then you would indicate that you need to assign the role of "Agency Recruiter" for the "Entire Organization." Whereas, you may have an employee in the Police Department you wish to have submit requests for certifications for positions *only* in the Police Department. If so, then you would indicate that you need to assign the role of "Agency Recruiter" for the "Dept/Unit only."

If you have any question about the access and/or rights of any of the security roles, please contact the Personnel Board for clarification *before* submitting this form.

You must complete a separate form (page 3) for each employee position for which you wish to request Workday security access rights.

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Workday Security Role Descriptions

The Workday Security Roles are designed to provide designated employees' positions access to certain employment records and allow various business processes to be performed within Workday. Please review the security role descriptions below to ensure that you are requesting the appropriate security roles for the designated employee position. An employee position may, and often does, have multiple roles assigned to allow access to different information and to perform multiple types of transactions. It is important to understand the workflow for your agency when requesting a Workday Security Role(s) to be applied to an employee position. If you have any questions regarding these security roles or their applicability to your agency, please contact the Personnel Board at 205-279-3500 and ask to speak with the Systems & Reporting unit.

Agency HR Partner – The Agency HR Partner provides access to update/initiate personnel actions for employee records to include, but not limited to work/home contact information, compensation via merit increases and premium pay requests, leave updates, terminations, and complete agency hires. This role will allow the user to access most employee records within your agency and allow the employee to initiate business processes (i.e., personnel actions). This role will allow employees to:

- View employment records and employment history for employees
- Initiate hires of candidates from issued certification lists for submission to the Personnel Board
- Initiate personnel action business processes (e.g., merit increases, requests for premium pay, placing an employee on leave, terminations) for designated department or all employees in your agency, depending upon your designated selection

Agency Approver – The Approver provides a first level approval for the appropriate department(s) regarding certification requests and personnel actions.

- View employment records and employment history for all employees within your agency

Agency Final Approver – The Agency Final approver provides final approval for all certification requests and personnel actions. This role is primarily designed to provide a review and approval of certification requests and personnel action business processes within your agency before they are submitted to the Personnel Board. This role will allow employees to:

- View employment records and employment history for all employees within your agency
- Approve submission of certification requests for *new* positions initiated by an Agency Recruiter

Agency Recruiter – The Agency Recruiter provides access to request and update certification requests to include, but not limited to initiating a certification request (new and replacement positions), reviewing applications and updating applicant statuses, and initiating agency hires (but not finalizing without additional approval). This role is primarily designed to provide access to initiate certification requests and review issued certification lists to help facilitate hiring within your agency. This role will allow employees to:

- View limited information on current employment records (job title, hire date, contact information) within your agency
- Approve certification requests for *existing* positions within designated department(s)/unit(s) to the Personnel Board
- Initiate (further agency approval is required) submission of certification requests for *new* positions within designated department(s)/unit(s) to the Personnel Board
- Review issued certification lists (including associated applications) for positions within designated department(s)/unit(s) in your agency, including the ability to:
    - Update statuses of candidates on these issued certification lists
    - Initiate offer/hire (further agency approval is required) of candidates on these certification lists

Agency Recruiter View Only – this role is designed to allow access to review issued certification lists to help facilitate hiring within your agency. This role is a view only role and cannot initiate or approve any actions within Workday. This role allows an employee position to:

- Review issued certification lists (including associated applications) for positions with within designated department(s)/unit(s) in your agency

Agency Talent Partner – this role is designed to allow access to initiate, review, modify, approve and provide support for performance management tasks in assigned organizations within an Agency.

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Workday Security Role Authorization Form

Please complete the fields below for any individual for whom you wish to request the application of a security role. The form must be completed in its entirety, including required signature of the Appointing Authority and the employee occupying the position for which the rights are requested. Scan and email completed forms to systemsandreporting@pbjcal.org. Please allow up to two business days for processing.

Employee & Position Information

Employee Name:_____ Employee Merit System ID #: _____

Employee Work Phone:_____ Employee Work Email: _____

Employee Job Title:_____ Employee Department: _____

Indicate the role(s) you wish to request be applied to the position occupied by the above listed employee: (check all that apply)

- ☐ Agency HR Partner — ○ Dept/Unit only ○ Entire organization
- ☐ Agency Recruiter — ○ Dept/Unit only ○ Entire organization
- ☐ Agency Final Approver — ○ Dept/Unit only ○ Entire organization
- ☐ Agency Recruiter View Only — ○ Dept/Unit only ○ Entire organization
- ☐ Agency Approver — ○ Dept/Unit only ○ Entire organization
- ☐ Agency Talent Partner — ○ Dept/Unit only ○ Entire organization

Appointing Authority Information

Appointing Authority Name:_____ Agency: _____

Email Address:_____ Work Phone: _____

Signature:_____ Date: _____

Employee Acknowledgement & Signature

My signature below indicates that I understand and acknowledge that the access provided to me in the Workday system should only be used for legitimate business purposes. I will only use information systems and resources for official authorized purposes. I will not access or attempt to access any unauthorized data or information. I also agree to avoid the disclosure of any protected information to which I have access.

I understand that my login ID and password are unique to me as a user of Workday. I will keep my login ID and password confidential. I understand that my login ID and password replace my handwritten signature and are equivalent to a handwritten signature. If I suspect that someone else is using my login ID/password, or if I suspect my password has been stolen or potentially compromised, I will immediately notify my Appointing Authority and the Personnel Board.

I understand that the Personnel Board reserves the right to monitor and log all Workday system activity. I understand that Workday system keeps audit trails of user activity and security/confidentiality violations may result in removal of access, disciplinary action up to and including termination, and/or criminal prosecution under state and federal laws.

Employee Name: _____

Signature:_____ Date: _____

For Personnel Board Use Only

☐ Approved ☐ Denied

Sys. & Rep. Mgr Signature: _____ Comments: _____

Date Received: _____