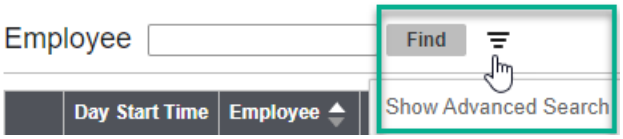
Employee Profile Search Tips

Log into WFM and select Schedule Admin. Select Employees from the blue toolbar, and then select Employee

Searching for an employee with a common name, or a select group of employees

1. A list of employee names displays – this includes names for teams you have security access to view and includes active and inactive records. Employees display in order by employee ID.
2. Each page list 25 employees, if more than 25 are listed there is a forward arrow on the left, below the list of names to advance to the next page
3. Above the list of employees, is a black header row which displays the various categories within the employee profile, such as Employee Last Name, First Name, Pay Group, and Hire Date. Select a header category, for example Last Name, and the list displays in order per category selected, in this example by last name.
4. The search box at the top is the most used method for selecting an employee record. Type the employee ID number. the last name, or the first name of the employee and select enter or find and the list of employees with the information entered displays. If searching by a common first or last name, you may still have >25 names depending on your security. **First tip:** Searching with the employee ID is the fastest way to search.
5. **Second tip:** If you are searching for a common name, select icon next to find to open the advanced search filters and each category is listed above the names. You can filter to more or more categories to narrow the list of employees that display.



6. Type the employee's first and last name in the respective fields, then select the blue Go button located below the filters. The employee or employees with the name entered display.
7. **Third Tip**: If you are searching for a group of employees, for example all Active RNs or Active RNs in a specific Workday Supervisor Organization number (SupOrg) then you would: Select Status of Active, Default job of RN, and enter the SupOrg number for the WD Home Dept Code, and then select Go.

When you see the list of categories, you can see that there are several ways to search, the combination of filters is almost endless.

Fourth tip: Once an employee record displays – jump to sections instead of scrolling

1. Hover the computer mouse over the ellipsis (the three dots) following employee view, the categories are listed
    a. Employee Data – select to update default hours
    b. Employee Job – select to view or update jobs
    c. Employee Teams – select to view or update teams
    d. Employee Skills – select to view, update, or add skills or competency
    e. Employee Default Shift – select to view or update shifts for self-scheduling only
    f. Future Leave Balance (Projected One Year) – use balance report to see actual balances

g. Updated by system, do not edit – Employee Entitlement Policies, Employee Data with Datepicker and Employee Data with Y or N Option

2. Select a category from the list and the system takes you to that category.
3. If you want to return to the lists, select Top on the row below category information.

Things you might want to view or update from the Employee record:

- Your team has a set Default Daily Minutes in the system, for example your employees schedule mostly to 12-hour shifts, then the default daily minutes is 720 which is 12x60 = 720, or your employees schedule mostly 8-hour shifts then the default daily minutes are set to 480 minutes which is 8x60 = 480. If you have an employee that works a shift time that varies from the norm, then the default daily minutes will be updated on the Employee Basic Information-Override record and the default hours will be updated on the Employee record – you will hover the mouse over the ellipsis and select Employee Data where you will see the Default Hours
- The employee should always have a default job of their hired job, based on the WD Job Code. They may schedule to what we call scheduling jobs. These are jobs created to make the schedules easier to view when you have employees scheduled to jobs or roles that do not match the title from their job code – you will hover the mouse over the over the ellipsis and select Employee Job to jump to the list of jobs
- If you add a scheduling job that requires a license (only one license), then you will need to add the job to the skill section - you will hover the mouse over the over the ellipsis and select Employee Skills. If the scheduling job being added can have employees from various jobs scheduled, then you will not add that job in the skill section, examples: Nurse Med Surg, Clinic Assist, Clinic Nurse, Spec Proc Tech. A few examples of jobs that must be added in the skills section: CN, SL, RN-Triage, LPN-Triage, LPN-Lead
- There is an employee from a travel agency, whose home team is External Agency Staff - the employee is contracted to work on your team, you will add your team in the Teams section - you will hover the mouse over the ellipsis and select Employee Teams
- You are going add the employee's default shifts because your team self-schedules and adding the employee default shift will allow them to use the Quick Select feature in the self-scheduler - you will hover the mouse over the ellipsis and select Employee Default Shift

To learn more about making the above listed updates, go to the WFM Help site by selecting HELP from the blue toolbar in the Schedule Admin or enter the url: www.vumc.org/wfm to go directly to the site. From the Schedule Admin Toolbox in the Employee Profiles section are documents with steps for the first four items and the last item, updating employee default shift for self-scheduling can be found from the Self-Scheduling section.

You can always reach out to us via email – wfm@vumc.org or log a Pegasus ticket for urgent matters by calling the VUMC Help desk at 615-343-3457.