

ASSOCIATE RECORDS IN WORKDAY

A Guide for HR



Workday HCM allows us to leverage technology to bring certain business and people processes together to manage them efficiently, all in one place. Workday HCM also gives us the ability to go paperless in many parts of managing an associate's record from hire to retire.

As more features are added to Workday HCM, even more records will be incorporated into this user-friendly system, ensuring consistent recordkeeping across the organization. Until then, here is a summary of key associate records and how they can be managed with the introduction of Workday HCM.

Associate Documents

The following summarizes the various documents that should be stored in Workday HCM and who has access to upload and view those documents.

Records NOT in Workday

There are certain documents that should never be housed in Workday HCM:

- Email communications
- Legal advice
- Investigations/Complaints
- Union grievances and related
- Medical or drug testing records



















DOCUMENT	EXAMPLES/COMMENTS	ASSOCIATES CAN...	MANAGERS CAN...	HRBP CAN...
CMP (Final Version)	Beginning with FY19 cycle	VIEW	UPLOAD VIEW	UPLOAD VIEW
Contractual Agreements	Non-Compete, Repayment Agreements	VIEW		UPLOAD VIEW
Departure from Company	Resignation Letters, Termination Notices, Severance Agreements, Exit Interviews	VIEW		UPLOAD VIEW
Personal Information – Legal Name Change	Marriage Certificates, Divorce Decrees	UPLOAD VIEW		VIEW
Policy Acknowledgments	Captured in Workday as part of onboarding after Oct. 29, 2018	VIEW		UPLOAD VIEW

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Record Retention at Sysco

If you have uploaded a document to Workday, you do not need to retain a copy in a local file. Workday is compliant with Sysco's Record Retention Policy which can be found [here](#).



DOCUMENT	EXAMPLES/COMMENTS	ASSOCIATES CAN...	MANAGERS CAN...	HRBP CAN...
Warning / Disciplinary Action	Written Warnings, Suspension Notifications		  UPLOAD VIEW	  UPLOAD VIEW
Employee Performance	Commendations, Awards, Customer Complaints, Attendance/Tardiness Documents		  UPLOAD VIEW	  UPLOAD VIEW
Performance Documents/Evaluation	Performance Improvement Plans, IDPs, 360 Feedback Forms		  UPLOAD VIEW	  UPLOAD VIEW
Training/Development	New Hire Checklists, Training documentation tied to an associate's job performance (such as MA or Selector training)		  UPLOAD VIEW	  UPLOAD VIEW
Recruiting Documents				  UPLOAD VIEW

Current Documents

You may have historical paper records on current and former associates. It is not required that you scan and upload paper documents that can now be stored in Workday.

If an associate is moving to another company, you may wish to scan and upload necessary documents to the associate's Workday record.

Associate-owned Paperless Records

Associates directly manage their own records without submitting any paperwork for changes to:

- **Home Contact** (address, email, phone numbers)
- **Emergency Contact**
- **Preferred Name**
- **Direct Deposit**
- **Federal Withholdings**
- **Profile Photo**

Current Systems of Record

FUNCTION	SYSTEM OF RECORD
Garnishments/ Payroll	ADP
Recruiting	SuccessFactors
Onboarding	Workday
Leave of Absence	The Hartford
Benefits	Alight (Sysco Benefits Center) & Fidelity
Investigations/ Complaints	Conversant

Frequently Asked Questions

If an associate joined Sysco before Oct. 29, 2018, do they need to accept or acknowledge any of their employment policies again in Workday?

Accepting or acknowledging company policies within the Workday HCM system is an onboarding requirement for associates who join the company (or move to another Sysco company) on or after Oct. 29, 2018 only.

Do I need to upload paper records into Workday HCM for any associates hired before Workday HCM became our system of record?

You do not need to upload associate records created prior to Oct. 29, 2018 into Workday HCM. All documents created after Oct. 29, 2018 should be uploaded into Workday HCM. If an associate is moving to another company, you may wish to scan and upload necessary documents created prior to Oct. 29, 2018 to the associate's Workday record.

If I decide to scan and upload the paper files I have for an associate hired before Workday HCM became our system of record, do I need to retain the paper files?

If a document has been uploaded to Workday, it does not need to be retained in paper form and can be destroyed.

Are there any associate records that should not be loaded into Workday HCM?

Email communications, legal advice, investigations/complaints, Union grievances and related documents and any medical or drug testing related document should not be uploaded Workday HCM.

If you have additional questions about associate records and cannot find the answers on SyscoWorkday.com, contact your Legal team representative.

