



Human Resources Job Aid
MANAGING UNION
MEMBERSHIP

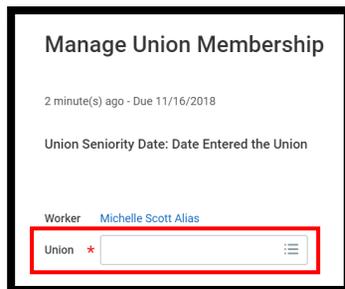
**NOTE: WORKDAY IS CONSTANTLY UPDATING THEIR TOOLS, SO THIS JOB AID
MAY NOT REFLECT EXACTLY WHAT YOU SEE IN WORKDAY.**

Managing Union Membership

HR Partners can manage union assignments and will receive an Inbox task if an associate is being hired into or moving from/to a location and/or job profile that contains a union code. Below are instructions for scenarios where the HR Partner is required to manage union memberships.

NEW HIRE

1. If a union associate has been hired, the HR Partner(s) will receive a task in their Inbox. Open the Inbox to see the task.
2. In the **Union** field, search for the union code number for the position and organization.



Manage Union Membership

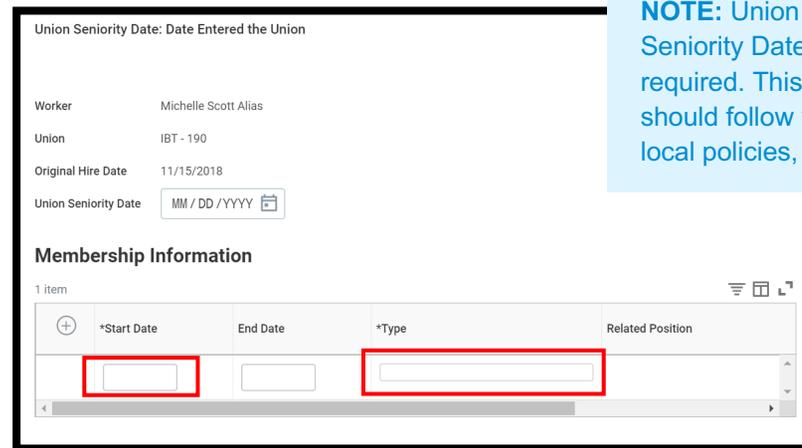
2 minute(s) ago - Due 11/16/2018

Union Seniority Date: Date Entered the Union

Worker Michelle Scott Alias

Union *

3. Click **OK**.
4. Enter the **Start Date** (the associate's Hire Date).
5. Do not enter an **End Date**.
6. In the **Type** field, select **Active-Active-No Dues**.



Union Seniority Date: Date Entered the Union

Worker Michelle Scott Alias

Union IBT - 190

Original Hire Date 11/15/2018

Union Seniority Date MM / DD / YYYY

Membership Information

1 item

*Start Date	End Date	*Type	Related Position

NOTE: Union Seniority Date is not required. This date should follow your local policies, if any.

7. Click **Submit**.

NOTE: It is important that you enter the associate's Hire Date as the Start Date of the union.

Active-Active-No Dues: Because payroll and dues are managed separately, this will be the only choice. This is a required field and will not drive any payroll items. Continue to follow your local policies.

Managing Union Membership

JOB CHANGE: UNION TO DIFFERENT UNION POSITION/LOCATION

If an associate who belongs to a union is moving to another union position/location, the HR Partner(s) will receive an Inbox task. See details below.

1. When a Job Change has been initiated, the HR Partner(s) will receive an Inbox task. Open the Inbox to see the task.
2. Open the task and click the **Union** field. Then select the **Worker's Current Unions** option.



3. Click **OK**.
4. Click on the current union to open the **Manage Union Membership** page.
5. In the **End Date** field, enter the last day the associate will occupy the current position (a.k.a. the last day in the current union).

A screenshot of the 'Membership Information' form. The form has a table with columns: '*Start Date', 'End Date', '*Type', and 'Related Position'. The 'End Date' field is highlighted with a red box.

6. Click **Submit**.
7. Click on the plus sign.

A screenshot of the 'Membership Information' form. The plus sign icon in the top left corner of the table is highlighted with a red box.

8. Enter the **Start Date**, which should be the first day the associate will occupy the new position.
9. In the **Type** field, select **Active-Active-No Dues**.

A screenshot of the 'Membership Information' form. The 'Start Date' and '*Type' fields are highlighted with red boxes.

10. Click **Submit**.

NOTE: If the Job Change includes a different location, the original (sending) HR Partner will end the old union membership and the receiving HR Partner will enter the new start date and union type.

Managing Union Membership

JOB CHANGE: UNION TO SAME UNION POSITION/LOCATION

If an associate who belongs to a union is moving to another position/location in the same union, the HR Partner(s) will receive an Inbox task.

1. When a Job Change has been initiated, the HR Partner(s) will receive an Inbox task. Open the Inbox to see the task.
2. Open the task and click the **Union** field. Then select the **Worker's Current Unions** option.



3. Click **OK**.
4. **DO NOT CHANGE ANYTHING ELSE.**
5. Click **Submit**.

NOTE: The Job Change will not be completed until this task is completed.

Managing Union Membership

JOB CHANGE: UNION TO NON-UNION POSITION/LOCATION

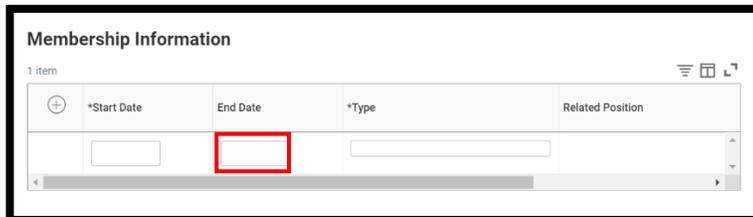
If an associate who belongs to a union is moving to a non-union position/location, the original (sending) HR Partner will receive an Inbox task to end the current union membership. The receiving (non-union) HR Partner does not need to initiate and will not receive any tasks.

1. When a Job Change has been initiated, the original (sending) HR Partner(s) will receive an Inbox task. Open the Inbox to see the task.
2. Open the task and click the **Union** field. Then select the **Worker's Current Unions** option.



A screenshot of a dropdown menu for the 'Union' field. The 'Union' label is highlighted with a red box and has a red asterisk next to it. An arrow points from the 'Union' label to the dropdown menu. The dropdown menu has two options: 'Worker's Current Unions' and 'All Active Unions', both with right-pointing chevrons. The 'Worker's Current Unions' option is highlighted with a red box.

3. Click **OK**.
4. Click on the current union to open the **Manage Union Membership** page.
5. In the **End Date** field, enter the last day the associate will occupy the current position (a.k.a. the last day in the union).



A screenshot of a table titled 'Membership Information'. The table has one row and five columns: '*Start Date', 'End Date', '*Type', and 'Related Position'. The 'End Date' field is highlighted with a red box. The table also includes a '+' icon in the first column and a search icon in the top right corner.

11. Click **Submit**.

NOTE: If the Job Change includes a different location, the original (sending) HR Partner will end the union membership. The receiving HR Partner (non-union) will NOT receive any tasks. The Job Change will not be completed until this task is completed.

Managing Union Membership

JOB CHANGE: NON-UNION TO UNION POSITION/LOCATION

If an associate who does NOT belong to a union is moving to a union position/location, the receiving HR Partner will receive an Inbox task to start the union membership.

1. The receiving HR Partner (union location) will receive a task in their Inbox. Open the Inbox to see the task.
2. In the **Union** field, search for the union code number for the position and organization.

Manage Union Membership

2 minute(s) ago - Due 11/16/2018

Union Seniority Date: Date Entered the Union

Worker [Michelle Scott Alias](#)

Union *

3. Click **OK**.
4. Enter the **Start Date** (the date the associate will move into the new position).

*Start Date	End Date	*Type	Related Position
<input type="text"/>	<input type="text"/>	<input type="text"/>	

5. Do not enter an **End Date**.

6. In the **Type** field, select **Active-Active-No Dues**.

*Start Date	End Date	*Type	Related Position
<input type="text"/>	<input type="text"/>	<input type="text"/>	

7. Click **Submit**.

NOTE: If the Job Change includes a different location, the original (sending) HR Partner (non-union) will not receive any tasks. The receiving HR Partner (union) will receive an Inbox task to enter the union start date and type.

The Job Change will not be completed until this task is completed.