This guide is the print companion to the video tutorial, “How to Edit Competencies.” Additional instructional content for the Annual Performance Evaluation Process is available on the Annual Performance Evaluation webpage of the Human Resources website.

If you have other questions, please contact the Office of Human Resources via e-mail at humanresources@furman.edu.
In this supervisor presentation, we will provide instruction on how to edit the competencies of a direct report in Workday.

If you are thinking that you’ve never edited competencies directly into Workday previously...

You are correct. Previously, supervisors advised of the competencies on which their direct reports were to be evaluated, and the Office of Human Resources entered the information into Workday.
Supervisors are familiar enough with Workday to successfully execute this task and this allows them to take full ownership of this process.

From the home page, in the search bar, type in the name of the staff member whose competencies you wish to review.

Click the orange related actions icon to open the position sub-screen.
On the position sub-screen, under "Actions," hover over "Position" to reveal the position action options.

Hover over position, then click “Edit Position Restrictions.”

This is the Hiring Restrictions screen. In the “Position Change Reason” box type “Update Competencies” and click enter. “Update Competencies>Update Competencies” should appear in the box.
Scroll down to the field "Worker Type."

Click in the box and select, "Employee."

Next, just below, in the field, "Worker Sub-Type" click in the box and select "Regular."
Once you have edited the information on the Hiring Restrictions screen, you are ready to edit the competencies which are on the Qualifications screen. Click, "Qualifications."

This is the Qualifications screen. Scroll down to the section called Competencies. There should be 11 competencies. If the staff member is new, this section may not have any competencies listed.

Only edit the elective competencies. **DO NOT** remove any of the Furman Core Competencies. To remove an elective competency, click on the minus sign (−) for each elective competency you wish to remove.
Then, click the plus sign (+) for every elective competency you wish to add.

For each competency you add, click the check box to designate the competency as required. All competencies must have this designation.

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How to Edit Competencies

Be certain that there are 11 required competencies - the six Furman Core Competencies, and the five elective competencies.

Once you have reviewed the competencies for accuracy, click, "Submit."

The process now goes to the Compensation Partner, then the Talent Partner for review. Click "Done."
Once the Compensation Partner and the Talent Partner review and approve the competencies, you should be able to view the identified competencies.

From the home page, in the search bar, type in the name of the staff member whose competencies you wish to review.

Click the orange related actions icon to open the position sub-screen.
On the position sub-screen, under "Actions," hover over "Position" to reveal the position action options.

Then hover over and click "View Position Restrictions" to be taken to the Position Overview screen.

From the Position Overview screen, click on "Qualifications."
How to Edit Competencies

Click the expand icon to see all 11 competencies.

To return to the home page, click the expand icon, then click the “W.”

Once this step is completely executed, you may turn your attention to Step 2: Start Performance Review.
Thank you for watching. If you have questions, please send an e-mail to humanresources@furman.edu.