

Talent Management: Matrix Organization Management

Matrix Management is a tool in Workday that allows leaders to route certain tasks to one of their direct reports. This will provide support during annual or ad hoc tasks that, due to volume, would be prohibitive for you to complete on your own. **You will not lose any functionality of managing your own staff and tasks in Workday.**

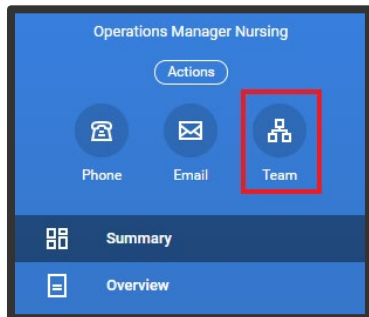
Matrix Management is separate from [delegation](#) and the administrative custom security role.

TASKS AVAILABLE WITH MATRIX MANAGEMENT

1. Goal Setting
2. Performance Reviews
3. Performance Improvement Plans
4. Disciplinary Actions

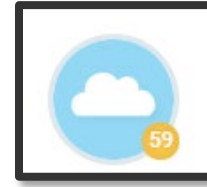
HOW MATRIX MANAGEMENT WORKS

1. **Eligible tasks are maintained by both the manager and matrix manager.** Both you and your matrix manager(s) will receive a task in your Workday inboxes, and once the task is completed, it will be removed from all inboxes.



2. As the leader, **you must maintain your matrix organizations.** As workers are hired or transfer into/out of your team, you must contact Human Resources to update their matrix management.

3. **You can view your matrix organizations** by clicking on the **Team icon** on your Workday profile.



4. **Matrix Managers will have number icon on their cloud,** which represents the number of people that have a dotted line to them.

CRITERIA

Matrix Management is only available to leaders who meet all of the following criteria:

1. The leader must have a direct report in a supervisory role (meaning the direct report is in a management level of supervisor or above)
2. The leader must have a minimum of 25 direct reports
3. The Matrix Manager must be in a management level of supervisor or above



Note: Once requested, Matrix Organizations could take 1 – 2 weeks to be set up.

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REQUESTING MATRIX MANAGEMENT

If you have additional questions, you may contact HR Technology when identifying your appropriate matrix manager(s), prior to your submission to HR Technology.

The leader must request Matrix Management via email to HR_Technology@geisinger.edu.

Use the Matrix Organization Template located [here](#) and include the following information:

Employee First Name

Employee Last Name

Employee Number

Position Number

Current Direct Supervisor

The Name(s) of the Matrix Manager(s) (**This is not the Current Direct Supervisor**)

Effective Date (The beginning of the current pay period or next pay period).

Please note we cannot add the following which should be excluded from this template:

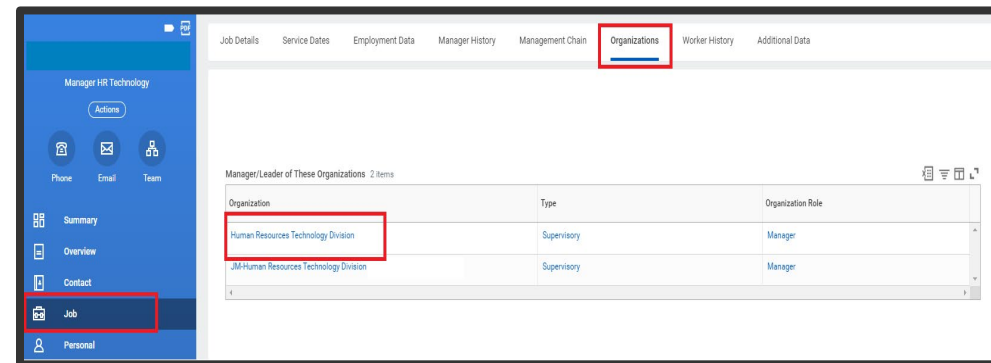
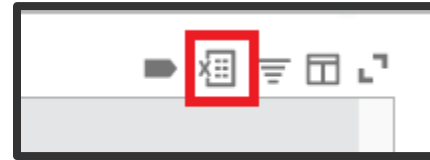
Future hires that have not started yet (Please send update files with these members on/after they have started)

Direct reports with future transfers

Direct reports with upcoming termination actions.



Note: The information requested can be found by: From your Workday home page – select **Job > Organizations** tab > click the appropriate **Organization** at the bottom of the page. Then select **Members** tab > choose **Excel** icon on the right.



Email Template:

Subject: Matrix Management (Leader's Name & Worker ID)

Body:

I am requesting Matrix Management to be granted to [name & ID of matrix manager] for the attached individuals.

Make sure to attach the updated Matrix Organization Template as an email attachment!

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MAINTAINING YOUR MATRIX ORGANIZATION

As the leader of a Matrix Organization, it is essential to maintain it. Matrix Organizations, unlike Supervisory Organizations, must be maintained manually, so when workers are hired or transferred into a different position direct reports or even matrix managers may fall off.

You can review an existing Matrix Organization setup for Matrix Managers by searching **org:** and **the name of a matrix manager** in the Workday search bar.

org: John Smith

Please use the Matrix Organization Template located [here](#) and only include direct reports that are missing from the Matrix Organization. You can send an email to hr_technology@geisinger.edu using the template below.

Subject: Matrix Management Updates (Leader's Name & Worker ID)

Body:

I am requesting updates to my Matrix Organization for the following Matrix Managers.

Matrix Manager Name & Worker ID

For Updates, please only include new direct reports that need to be added on the Matrix Org and make sure to attach the updated Matrix Organization Template as an email attachment!