Job Change

Managers: Use this job aid to enter a job change, transfer, promotion or hours per week change.

Getting started:

The job change business process contains a series of sections that will guide you through the associate's full position details. You can skip certain sections if they are not applicable to the job change. To do this, after you click Start below, you can use the menu on the left side of the Workday screen to move forward to another section.

If the job change involves two different orgs (e.g. transfer), it is a two-person task. The current manager initiates the transfer and will complete limited sections in this process. The receiving manager will complete all remaining sections.

1. From the Workday homepage, click on **My Team Management**
2. In the "Actions" menu, click on **Transfer, Promote or Change Job**
3. In the **Worker** field, search for the associate's name and click OK
   ➔ If the associate has multiple jobs, you will be asked the select the position you are using for the job change.
4. On the "Start" page, click on the pen icon to edit
5. Enter an **Effective Date**. The field will auto-fill with the start date of the next pay period, you can change this date.
6. In the **Why** field, use the prompt to select a reason.
7. In the **Who** field, your name will auto-fill because you are the current manager. If this is a transfer to a new manager, use the prompt to search for the name of the new manager.
8. In the **Which** field, your org name will auto-fill. If this is a transfer, once you enter the name of the new manager in step 7, the team will update. Do not make any changes if this is not a transfer.
9. In the **Where** field, the work location will auto-fill. Do not make any changes if the associate will remain in the current location.
10. **Do you want to use the next pay period?** This box will be checked by default if you choose not to change the effective date. If you changed the effective date, the box will be unchecked. Do not check the box again if you want to use the date you've entered. Click Start to continue.

Start Details

When do you want this change to take effect? *
● 04/15/2019   added

Why are you making this change? *
(empty)

Who will be the manager after this change?
Rachel Knight

Which team will this person be on after this change?
Finance & Administration

Where will this person be located after this change? *
⊙ New York

Do you want to use the next pay period?
● Yes   added

Move:

This section covers changes to your headcount *__if this is a transfer__*. Click on the pen icon to edit and click on the checkmark icon to save your entries. If this is not a transfer, you will not see this section.

1. Determine how you want to handle the opening left on your team. Use the prompt to select **1** of the **3** following actions:
   - **I plan to backfill this headcount:** This means you will replace the current headcount.
   - **Move this headcount to the new manager:** This means you will move the headcount to the new manager.
   - **Close this headcount:** This means you will close the headcount.
2. **Is the current position available for overlap?** Check this box if the current position will be filled with a replacement *prior* to the effective date of the transfer. This allows the current position to be shared between two workers until the current associate's last day in the position. If this is not applicable, do not check the box.

3. If the associate is a people manager, you will be asked to take action with their team. Check the **Yes** or **No** button, depending on your decision.

Opening

What do you want to do with the opening left on your team? ★

I plan to backfill this headcount

Is this position available for overlap?

Move Team

This person is a manager. Do you want to move their teams with them? ★

No

Job Change

Job:

This section covers changes to the position. Click on the pen icon to edit and click on the checkmark icon to save your entries. If you are not making any changes to this information, on your Workday screen, use the menu on the left side to move onto the next section.

1. To change the **Position**, use the prompt to search for the new position title
2. **Do you want to create a new position?** Check this box if you do not have a vacant position. This box will create an open position.
3. **Close the current position?** Check this box if you will not be replacing the current position. Otherwise, leave it unchecked if you will replace the position.
4. **Is the current position available for overlap?** Check this box if the current position will be filled with a replacement *prior* to the effective date of the job change. This allows the current position to be shared between two workers until the current associate's last day in the position. If this is not applicable, do not check the box.

5. To change the **Job Profile**, use the prompt to search for the new job profile name.
6. To change the **Job Title**, delete the current title and type in the new one. Updating the job title will not impact the job profile name.

Position

Position
Health Fitness Specialist

Do you want to create a new position?

Close the current position?
No

Is the current position available for overlap?
No

Job Profile

Job Profile ★
Health Fitness Specialist 16308

Job Title
Health Fitness Specialist

Job Change

7. To change the Business Title, delete the current title and type in the new business title.
8. Click Next to continue

Business Title

Business Title

Health Fitness Specialist

Location:

This section covers changes to the location. Click on the pen icon to edit and click on the checkmark icon to save your entries. If you are not making any changes to this information, on your Workday screen, use the menu on the left side to move onto the next section.

1. To change the **Location**, use the prompt to search for the new location
2. **Work Space:** Leave this field blank, do not make any changes here.
3. To change the **Scheduled Weekly Hours**, enter the new number in this field.
   → If the associate is On-Call, enter 0 (zero) in this field.
4. **Work Shift:** Leave this field blank, do not make any changes here.
5. Click Next to continue

Location Details

Location *
⊙ New York

Work Space
⊙ New York > 1155 Building > Suite 1500 > Cubicle 1525

Scheduled Weekly Hours
40

Work Shift
(empty)

Details:

This section covers changes to the job details. Click on the pen icon to edit and click on the checkmark icon to save your entries. If you are not making any changes to this information, on your Workday screen, use the menu on the left side to move onto the next section.

1. **Additional Job Classifications:** Leave this field blank, do not make any changes here.

Job Classifications

Additional Job Classifications

2. To change the **Employee Type**, use the prompt to select the new type.
3. To change the **Time Type**, use the prompt to select the new type.
4. To change the **Pay Rate Type**, use the prompt in the field to select the new type.
5. No other changes are necessary in this section, click Next to continue.

Administrative

Employee Type *
Regular

Time Type *
Part time

Pay Rate Type
Hourly

Location Weekly Hours
40

Default Weekly Hours
40

Attachments:

This section will allow you to attach documents. Click on the pen icon to edit and click on the checkmark icon to save your entries. If you do not need to attach a document, on your Workday screen, use the menu on the left side to move onto the next section.

1. To upload an attachment, click on the **ADD** button
2. Click on **Attach** to browse and select your document
3. In the **Document Category** field, use the prompt to select the best category.
4. Enter a **Comment** if needed
5. Repeat this process if you have more than 1 document to attach.

File

Attach

Document Category *

Comment

Job Change

Organization:

This section covers changes to the organization assignments. Click on the pen icon to edit and click on the checkmark icon to save your entries. If you are not making any changes to this information, on your Workday screen, use the menu on the left side to move onto the next section.

1. **Company:** If you need to change the Company, contact your HR Business Partner.
2. To change the **Cost Center**, use the prompt to search for the new cost center.
3. To change the **Business Unit**, use the prompt to search for the new Business Unit/Shared Services.

Company

Company *
Health Fitness Corporation

Cost Center

Cost Center *
H1WA West Wood Health & Fitness Center

Business Unit

Business Unit *
Health Fitness

Compensation:

This section covers changes to the compensation details. Click on the pen icon to edit and click on the checkmark icon to save your entries. If you are not making any changes to this information, on your Workday screen, use the menu on the left side to move onto the next section.

1. *OPTIONAL:* To change the **Employee Visibility Date**, enter a future date in this field. This date determines when the associate will see the new compensation details in their worker history.

Employee Visibility Date

Employee Visibility Date

2. Depending on the status of the associate, you will see an "Hourly" or "Salary" section on this page. Enter the new pay rate in the **Amount** field. Alternatively, you can also enter an *Amount Change* or *Percent Change*. Entering a number in any **1** of these **3** fields will update the others accordingly. You cannot update them all at once.
3. **Currency:** USD (US Dollars) will auto-fill, do not make any changes.
4. **Frequency:** The correct pay frequency will auto-fill, do not make any changes.
5. **Expected End Date:** Do not enter a date in this field.
6. Click Next to continue

Salary
Assignment Details
99,380.00 USD Annual
Plan Name
Salary
Effective Date
04/01/2018

Summary:

This last section will summarize the job change entries you have made. We recommend that you review all sections for accuracy before submitting the request through for approval. Click on the pen icon to edit and click on the checkmark icon to save your entries.

To view the status of the job change:
1. On your Workday homepage, click on **My Team Management**
2. In the "Recent Activity" section, click on the gear icon and select **View More**
3. Click on the row that corresponds to the associate, you will see the **In Progress** status and who the request is waiting on for approval.