STATEWIDE PERSONNEL SYSTEM

Change Job

October 2015

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Change Job Business Process

Process Overview

The **Change Job** process is used to perform job changes for employees including:

- Promotions
- Demotions
- Transfers
- Data Changes (FTE changes or other administrative changes)
- Reclassifications*

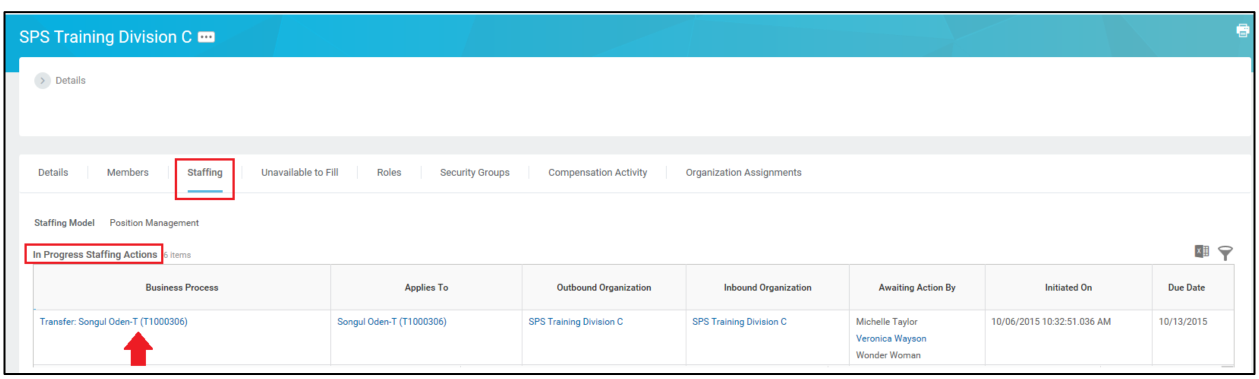
*For reclassifications, the **Change Job** process allows you to perform job changes on employees whose positions have been reclassified. Job changes to the worker are completed after the position reclassification. This process is a part of the Edit Position Restrictions business process. See the *Edit Position Restrictions* user guide for details on reclassifications.

Promotions, Demotions, and Transfers from JobAps

Many change job event in the system will be initiated though a completed recruitment in JobAps. These events will use a reason that includes “JobAps” in the name. These codes indicate that a promotion, voluntary demotion, or a transfer within or outside of your Agency) was initiated from the JobAps system into the Workday system.

Though the system automatically initiates the Hire process through JobAps, the HR Coordinator will have a required action in their Workday inbox to perform the other steps of the process.

You can view Change Job staffing events (promotions, demotions, and transfers) by looking up the Supervisory Organization. You can view all “In Progress” staffing actions and their status on the Staffing tab. See screenshot below.



The steps in the business process are listed below.

Process Steps	Role	Description
Initiate Job Change Request	HR Coordinator	Enter type of job change and related details attach form(s), if applicable (e.g. MS-27).
Review JobAps Data*	HR Coordinator	Review data from JobAps and attach form(s), if applicable (e.g. MS-27).
Review Current and Receiving Manager	HR Partner	Review current and receiving manager for an employee that is moving to a new manager.
Propose Compensation Change	HR Coordinator	Enter compensation changes for the employee (except for transfers).
Agency Job Chang Approvals*	HR Partner	Agency HR Director approval of the request
	Appointing Authority	Agency Appointing Authority approval of request
DBM Job Change Approvals	Compensation Partner	DBM CAS approval of compensation change (not applicable for transfer)
Role Assignment to Dos*	HR Coordinator	Determine if the worker has roles that need to be reassigned. Assign roles to another worker, if applicable.
	HR Coordinator	Review user-based security assignments, if applicable
Assign Pay Group*	HR Coordinator	Assign pay group for job change. **NOTE**: if the employee has multiple jobs, assign pay group for position change.

NOTE:
Some tasks (marked with asterisk {*}) in the Change Job process are not always required due to the reason selected for the job change or other conditions.

Events and Reasons

You will need to select one of the following reasons when initiating a job change on a worker:

Event	Reason
Change Job	Data Changes – Change in Employee Type
	Data Changes – Change Job Details
	Data Changes – Change Location
	Data Changes – Corrections
	Data Changes – FTE Change
	Data Changes – Other Data Changes
	Data Changes – Change in Employee Type
	Demotion - Disciplinary
	Demotion – JobAps Voluntary*
	Promotion – JobAps*
	Promotion – Promotion
	Transfer – Contractual Conversion
	Transfer – End of Temporary Duty
	Transfer – Independent Agency
	Transfer – Intra Agency
	Transfer – JobAps-Independent Agency*
	Transfer – JobAps-Intra Agency*
	Transfer - JobAps-Other Agency*
	Transfer – Other Agency
	Transfer – Reassignment in Same Agency
	Transfer - Temporary Duty

NOTE: Reasons marked with an asterisk (*) indicate that a transaction (i.e., promotions, voluntary demotions, and transfers) was submitted as a result of a JobAps recruitment. Reasons associated with these transactions will be selected automatically when the Change Job process is initiated by JobAps. You will not select these reasons manually.

Before you begin…

You will need the following information to complete the Change Job process:

- Supervisory Organization
- Employee's name or employee ID
- Receiving manager and related Supervisory Organization (if being moved to a different team)
- Effective Date of transaction
- Position ID/Name
- Job Profile
- Employee's Job Title
- Scheduled Weekly Hours (for FTE changes; if applicable)
- Job Details (e.g., Time Type)

HINT: Use the SPMS View All Positions Report to identify positions and corresponding workers, supervisory orgs, FTE % and other details to assist with the job change.

Review Job Changes Initiated by JobAps

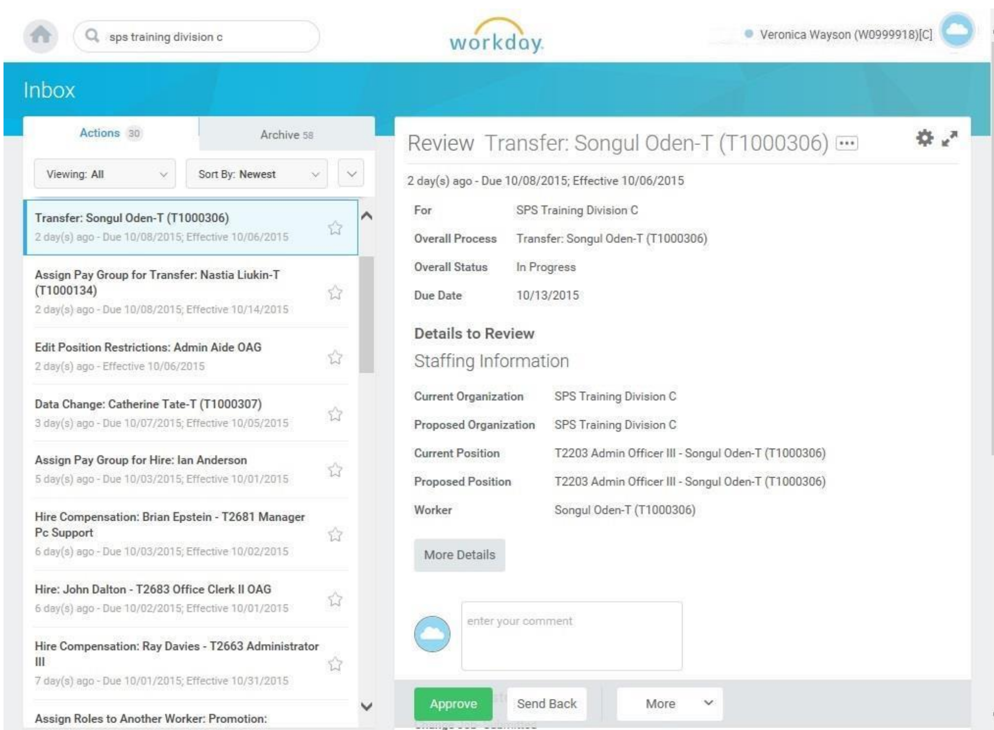
When a promotion, voluntary demotion, or transfer occurs as a result of recruitment in JobAps, you will receive a required action in your inbox. All job change data is entered automatically when the Change Job process is initiated by JobAps. The HR Coordinator needs to review this information and approve. After your approval and submission, all other steps in the Change Job business process will follow.

The procedure to review promotions, demotions, and transfer from JobAps follows. If you need to complete a promotion, demotion, or transfer that is not recruited in JobAps use the “Initiate Change Job in Workday” procedure.

Procedure:

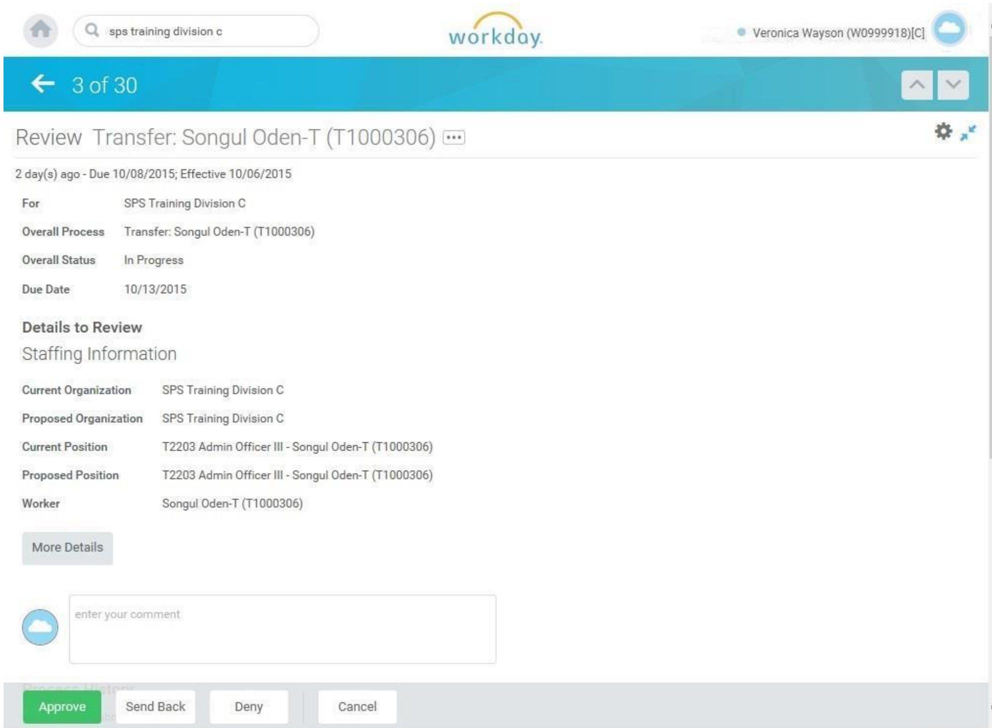
1. Click the **Inbox** icon.
2. Click the **Inbox** Inbox hyperlink.

Inbox



3. Click the Change Job task in your inbox (e.g., Transfer Songul Oden-T (T1000306).
4. Click the arrows to expand the window.

Inbox

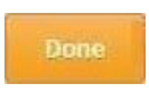


5. Click on the More Details  button to review the information.

6. Click the **Approve**  button.

Tip: If you do not want to approve the request at this point, you can also click one of the following buttons:

- Click **Deny** to reject the job change initiated in JobAps.
- Click **Save for Later** to save your changes but not submit.
- Click **Close** to return to your inbox and review the transaction at a later time.

7. Click the Done  button. You will retrieve the next task from your inbox.

Tip: After completing a task in the business process, you can view the next steps.

- Click the drop-down arrow next to **Details and Process** to expand the section.
- Click the **Process** tab to see the path that the process will take.
- See the Check the Status of a Business Process section of this guide for details on how to view, access, or complete other tasks in the process.

8. The System Task is complete

Initiate Change Job in Workday

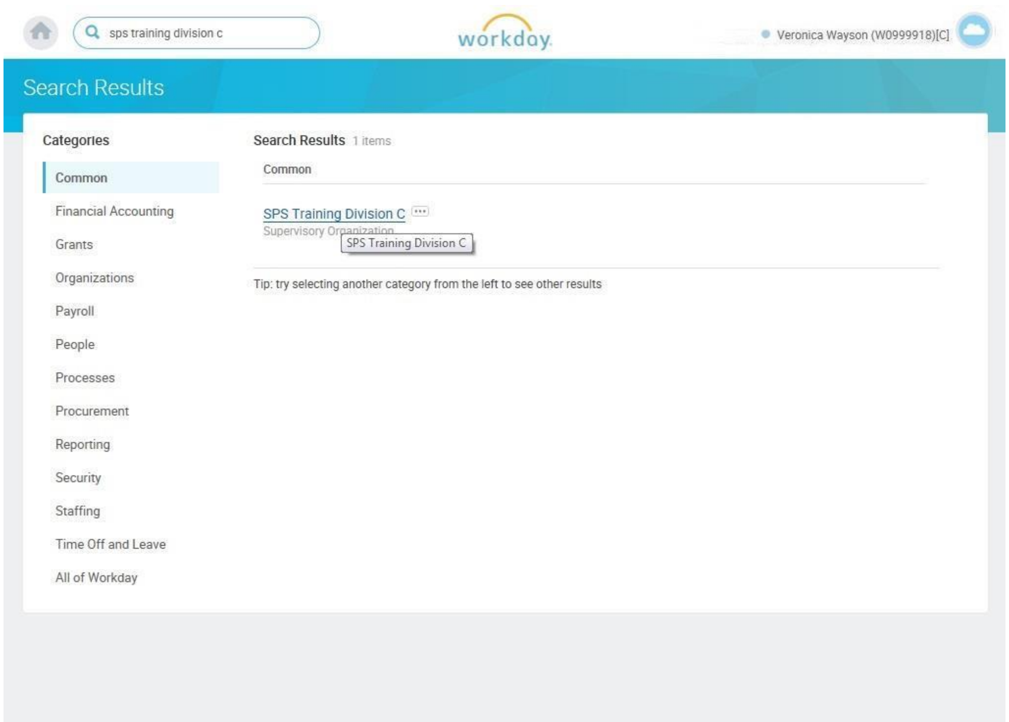
Procedure:

1. Type the Supervisory Organization name in the Search field.

   Tip: If you know the employee's name or employee ID for which you are processing a job change, you can search using these values.

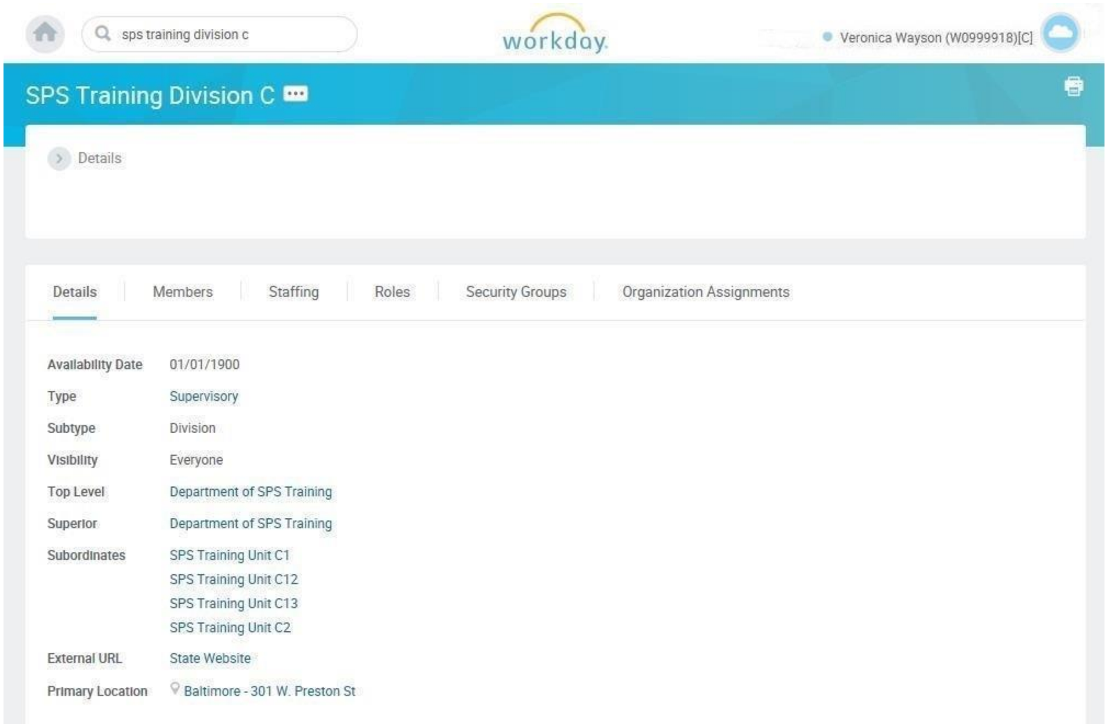
2. Click the **search** icon.

Search Results



3. Click on the Supervisory Organization hyperlink.

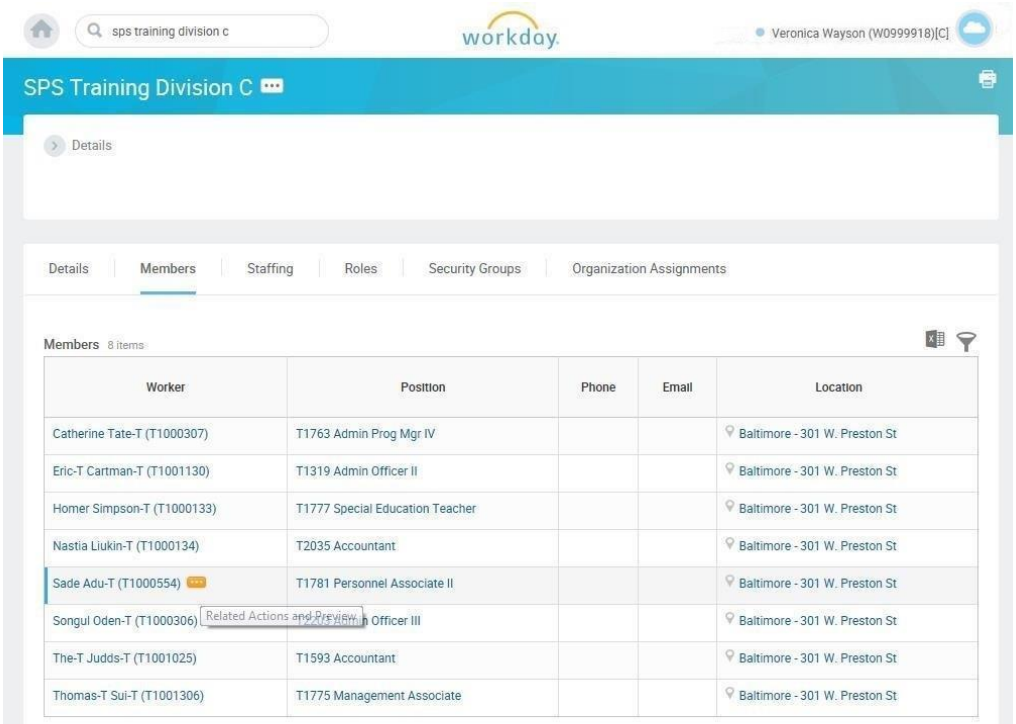
Supervisory Organization Details



4. Click the **Members** 

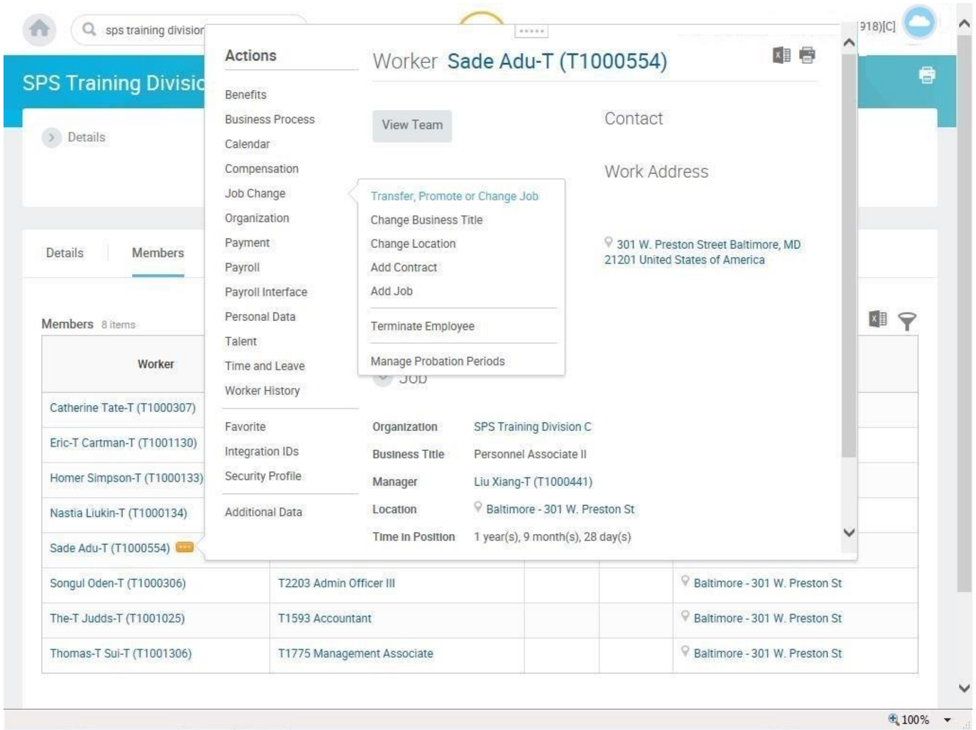
tab button.

Organization Members



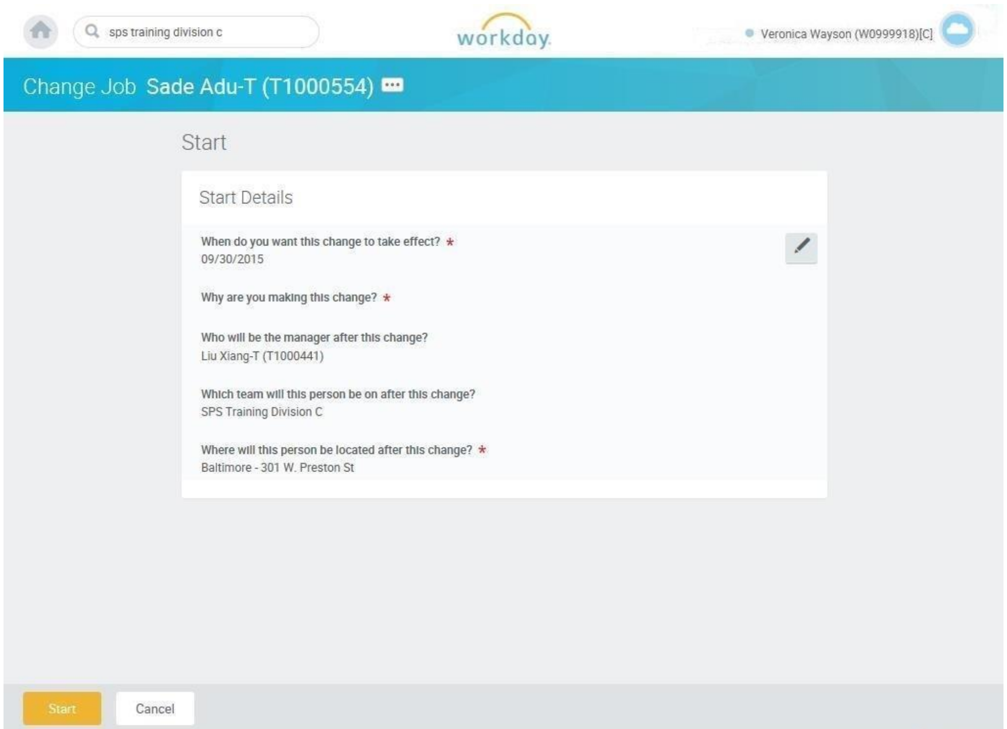
5. Identify the employee you want, then click the Related Actions and Preview icon next to the employee's name.

Organization Members



6. In the menu, hover over the Job Change, and then click Transfer, Promote or Change Job.

Change Job



7. Click the Edit icon to update the following fields on the Start page, if applicable.

    - When do you want the change to take effect? (Enter the effective date.)
    - Why are you making the change? (Enter event reason)
    - Who will be the manager after the change? (Enter manager's name.)
    - Where will this person be located after this change? (Review/Enter Primary Job location or supervisory org)

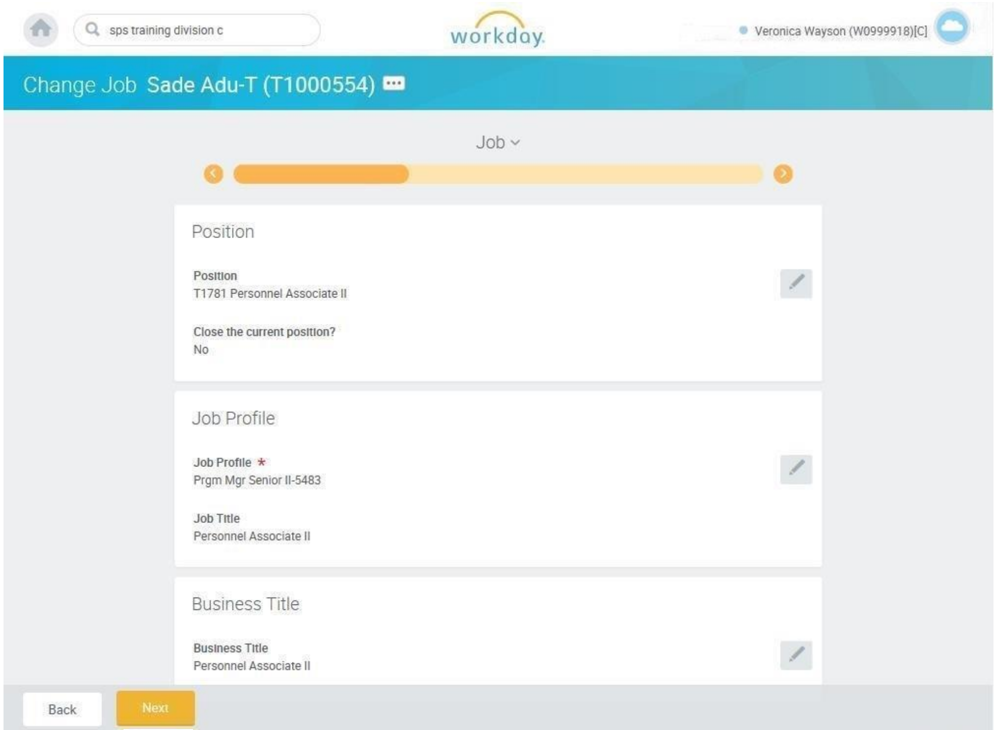
Information: The supervisory org defaults from the manager selected. If the manager supervises more than one team, you will need to select the appropriate supervisory org.

8. Click the **Start** button.
9. If an employee will have a new manager as a result of the job change, the Move Page displays.

    Click the Edit icon to update the following field, if applicable:
    - What do you want to do with the opening left on your team (Select from the drop-down menu)

Information: Always select "I plan to backfill this headcount" if you want the position that the employee is leaving to remain open.)

Change Job

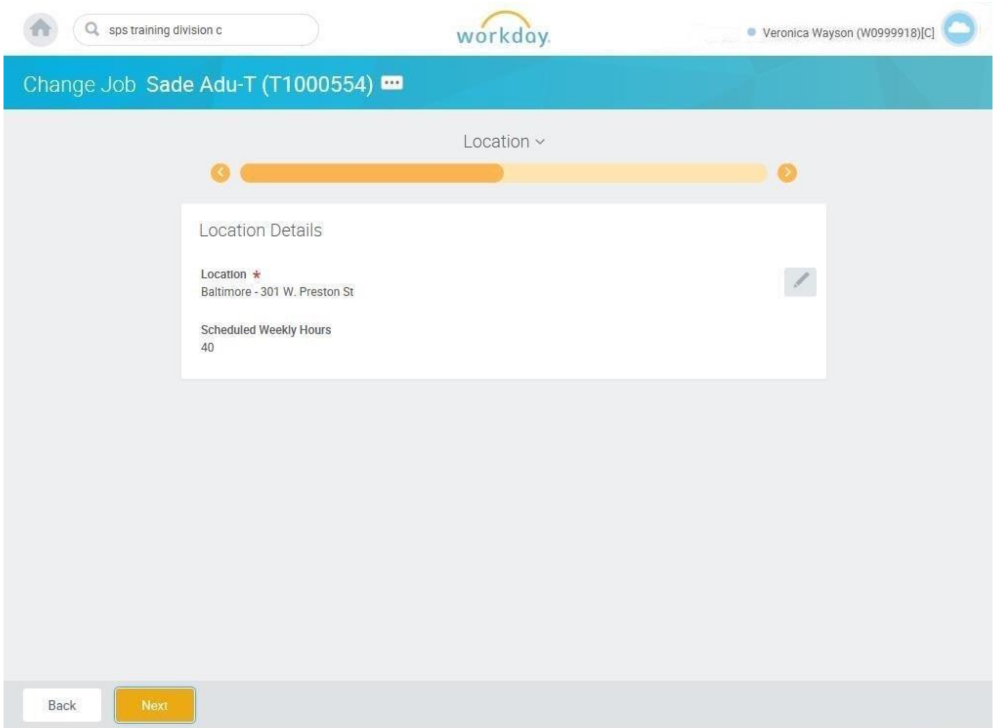


10. Click the Edit icon to update the following fields on Job page, if applicable:

- Position (do not change for reclassification or if splitting a position)
- Job Profile (defaults from position)
- Business Title (Working Title; defaults from position)

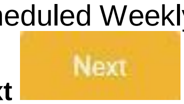
11. Click the **Next** icon.

Change Job



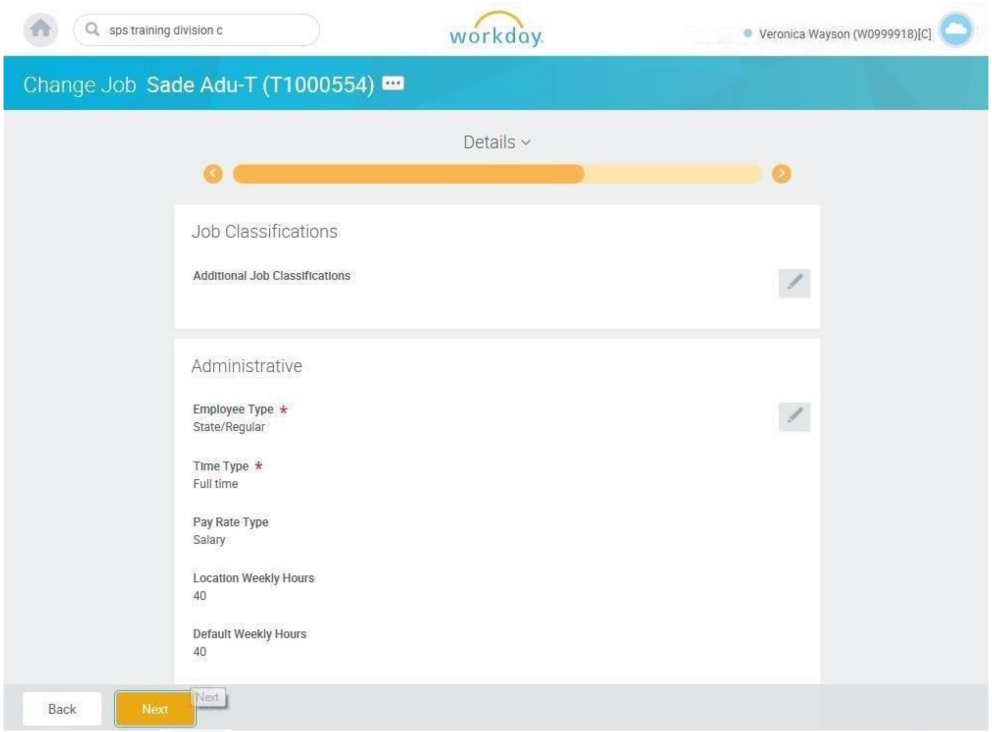
12. Click on the Edit  icon to update the following fields on Location page, if applicable:

- Location (defaults from the manager selected)
- Scheduled Weekly Hours (update if making an FTE change)

13. Click the **Next** 

button.

Change Job



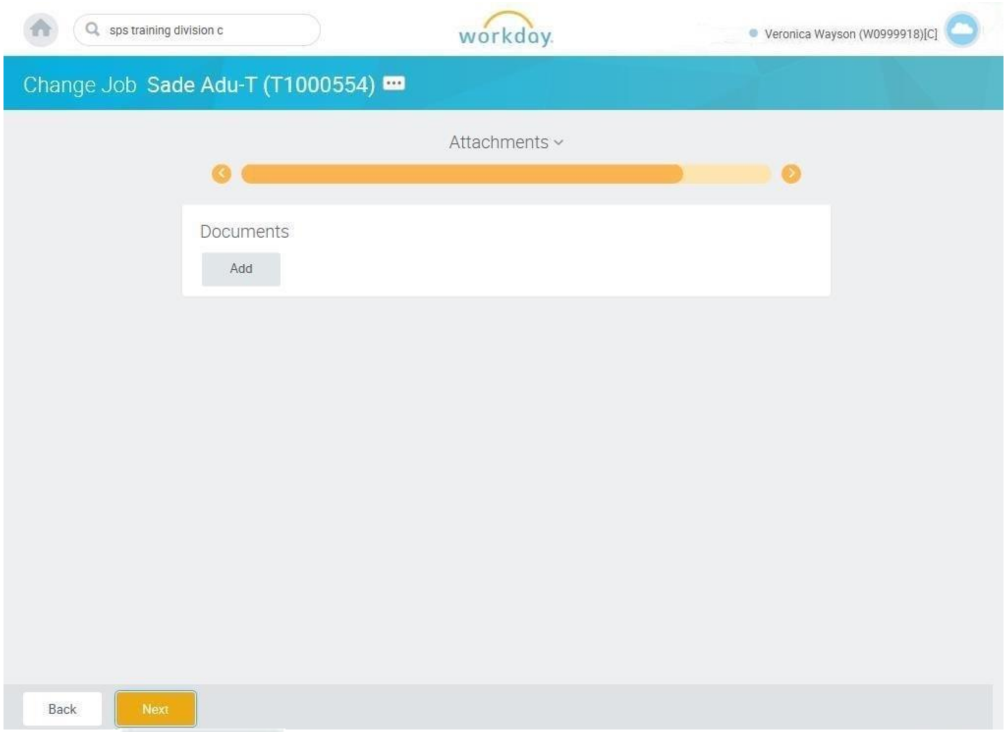
14. Click on the Edit icon in the Administrative section of the Details page to update the following field, if applicable:

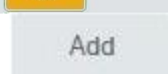
    - Time Type (example: part-time/full-time, for FTE changes; this may also default from the position selected)

Information: Do not update other fields on this page as they default from the position, job profile, or other sections.

15. Click the **Next** button.

Change Job



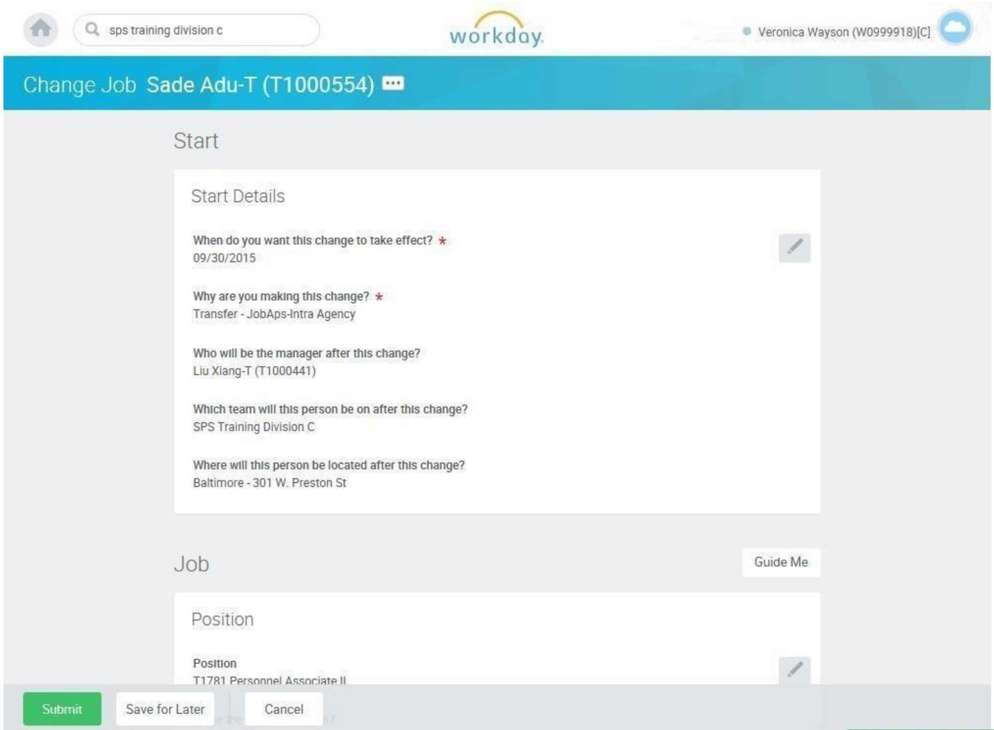
16. Click on the  button to add an attachment, if applicable.

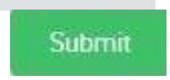
    - Select the appropriate **Document Category**.
    - Click the **Attach** button, browse and select a document to attach.

Information: Attach the MS-27 Salary Guideline Exceptions here when you go outside on the salary guidelines. You will update the employee's compensation on a later step in the Change Job Business process.

17. Click the **Next**  button.

Change Job

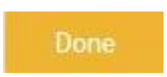


18. Review your entries on the Summary page. When you are done, click the 

button.

Tip: If you do not want to submit the request at this point, you can also click one of the following buttons:

- Click **Save for Later** to save your changes but not submit.
- Click **Cancel** to cancel the process and start at another time.

19. Click the **Done** 

button.

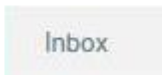
20. The System Task is complete.

Propose Compensation

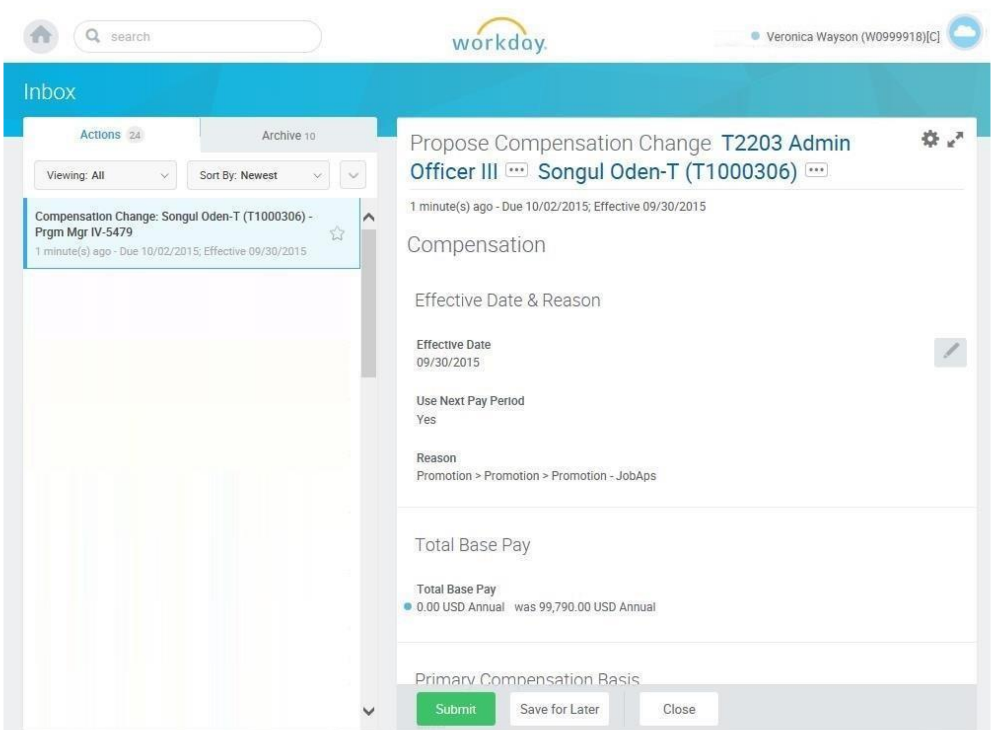
After submitting the job changes for an employee, you will update the employee's compensation. The procedure for this task follows.

NOTE: You will not perform this task for transfers.

Procedure:

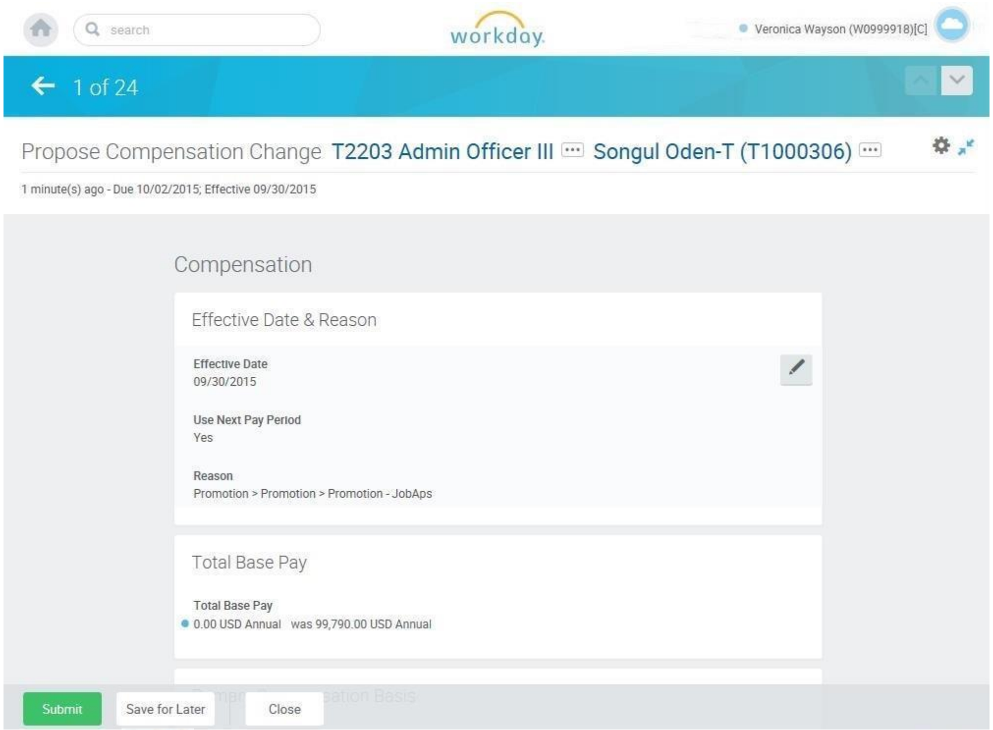
1. Click the **Inbox**  icon.
2. Click the **Inbox**  hyperlink.

Inbox



3. In your Actions list, click the "Compensation Change: " task. HINT: The employee's name is included in the task name.
4. Click the **Expand Inbox**  icon.

Propose Compensation



5. Click the Edit  icon at the right of the row to be edited.

6. Select one of the following options:

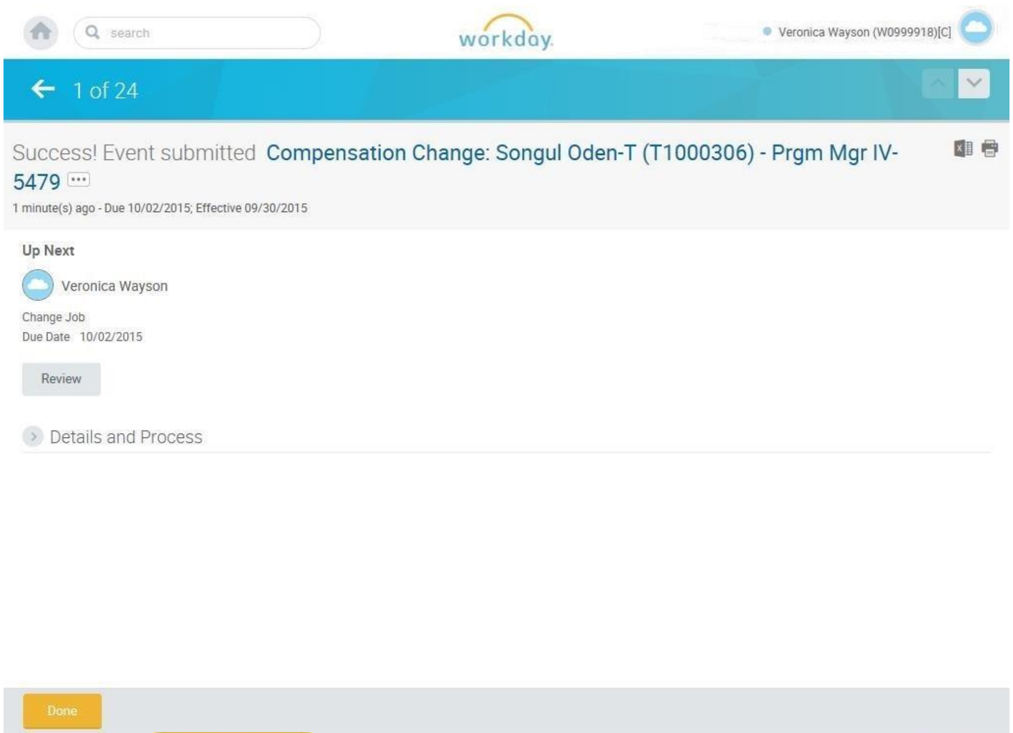
If	Then
Employee is paid on the Standard Salary Schedule or any schedule that has a Grade Profile and Step.	- Click the **Edit** button in the **Guidelines** row. - Type or use the prompt to enter the **Step**. - Click **Save**. **NOTE:** Compensation defaults based on the job profile. Choosing Step 10 or above requires additional approvals. Refer to Standard Pay Guidelines and Executive Pay Guidelines for more information.
Employee is paid on the Executive Schedule.	- Click the **Edit** button in the **Salary** row. - Enter the salary in the **Amount** field. - Click **Save**.
Employee Type is Contractual – Hourly.	- Click the **Add** Add button in the **Hourly** row. - Enter pay rate in the **Amount** field. - Click **Save**.
Employee Type is Contractual – Contract (i.e., fixed term contractual).	- Click **Add** Add button in the **Allowance** row. - In the **Compensation Plan** field, type or use prompt to select **Contract NTE$** from the list, if not already selected. - Enter the contract not to exceed amount (Contract NTE$) in the **Amount** field. - Click **Save**.

7. Click the **Submit** Submit button.

Tip: If you do not want to submit the request at this point, you can also click one of the following buttons:

- Click **Save for Later** to save your changes but not submit.
- Click **Close** to close the task and resume at a later time.

Inbox



8. Click the **Done** 

button.

Information: The compensation must be approved. The approval routing is based on the reason code selected when hiring the employee.

Tip: After completing a task in the business process you can view the next step.

- Click the drop-down arrow next to **Details and Process** to expand the section.
- Click the **Process** tab to see the path that the process will take.
- See the *Check the Status of Business Process* section of this guide for details on how to view, access, or complete other tasks in the process.

9. The System Task is complete.

Assign Roles to Worker

The Assign to Worker task is a “To Do” that displays when a worker leaves a position. When a worker leaves a job, there may be a need to assign that worker’s roles to another worker.

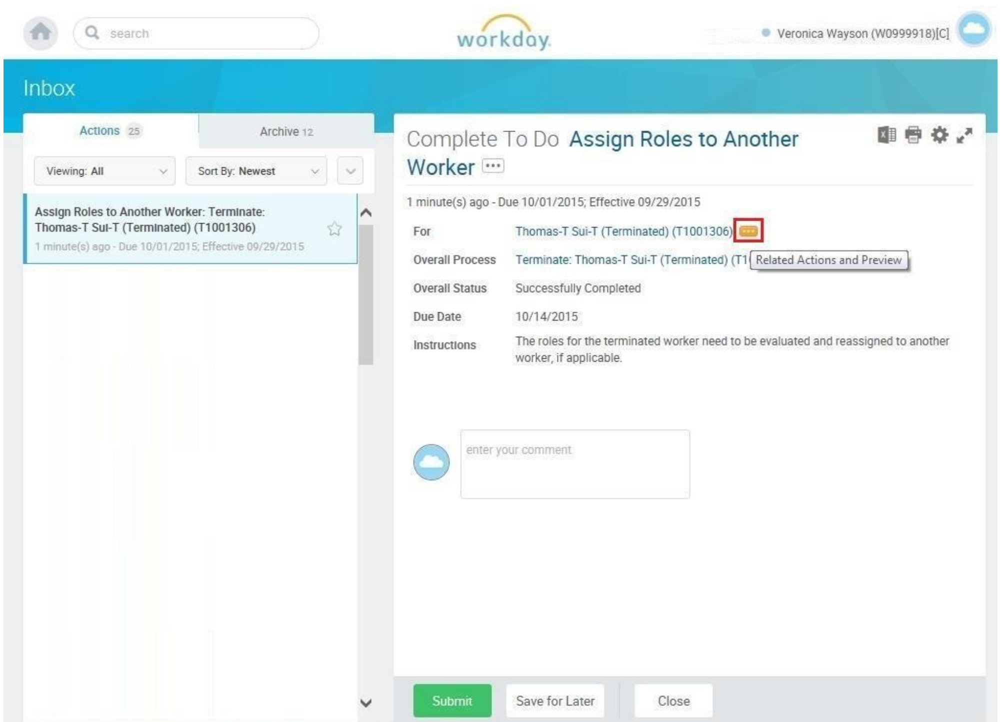
If the worker’s role is assigned to more than one person, it may not be necessary to assign roles to another worker.

The procedure to assign roles to another worker follows.

Procedure:

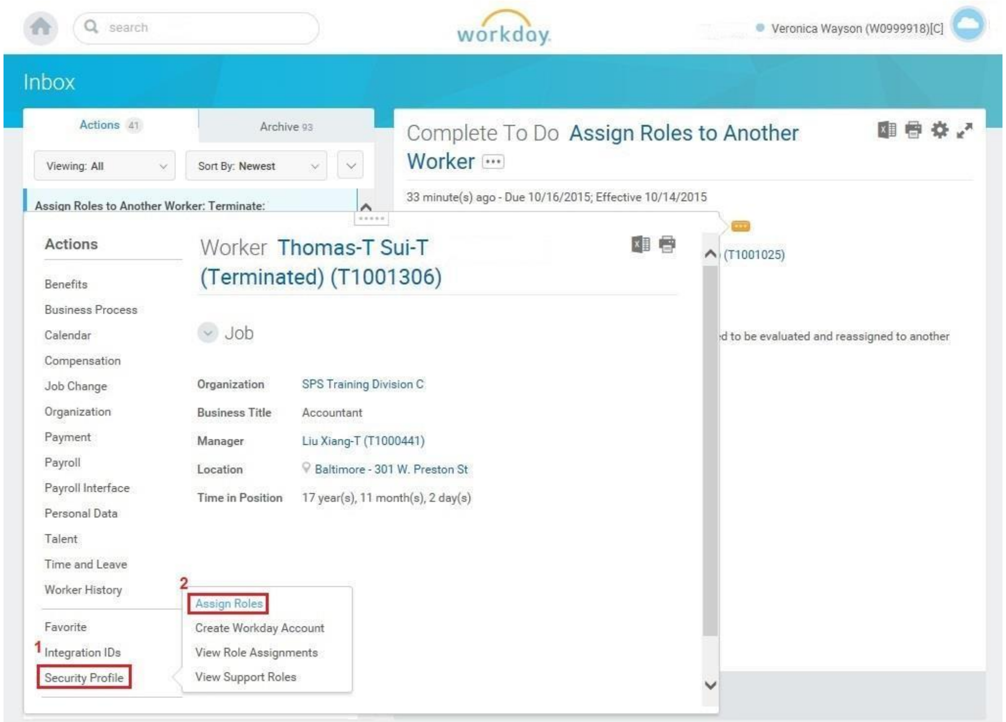
1. Click the **Inbox** icon.
2. Click the **Inbox** hyperlink.

Inbox



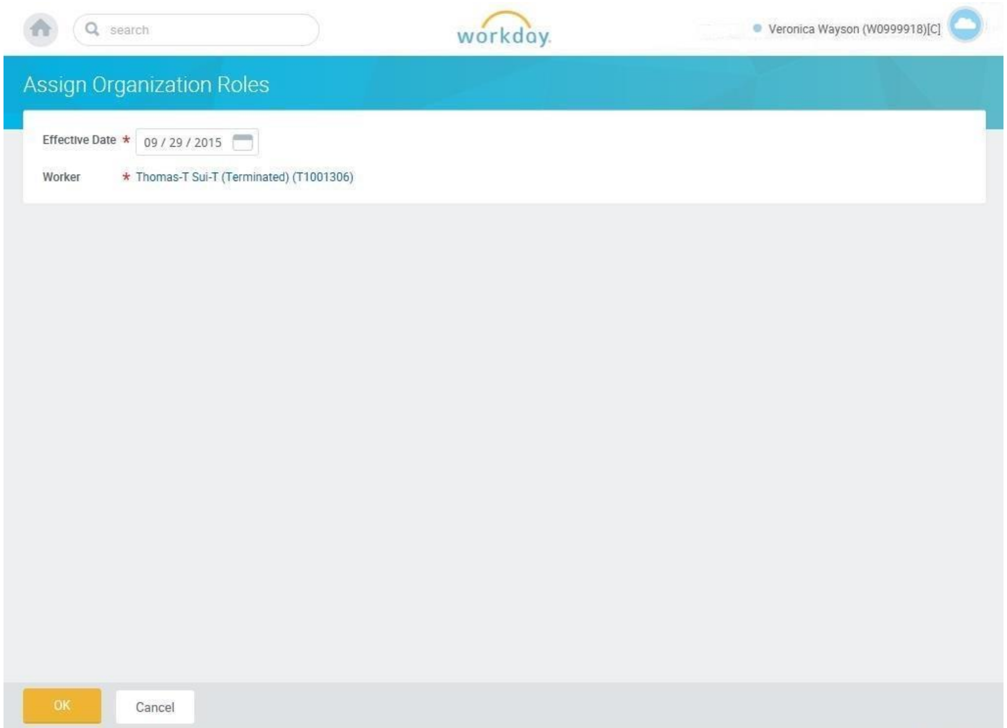
3. Click the Related Actions and Preview icon next to the worker's name.

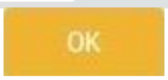
View Worker



4. In the menu, hover over the Security Profile and click Assign Roles.

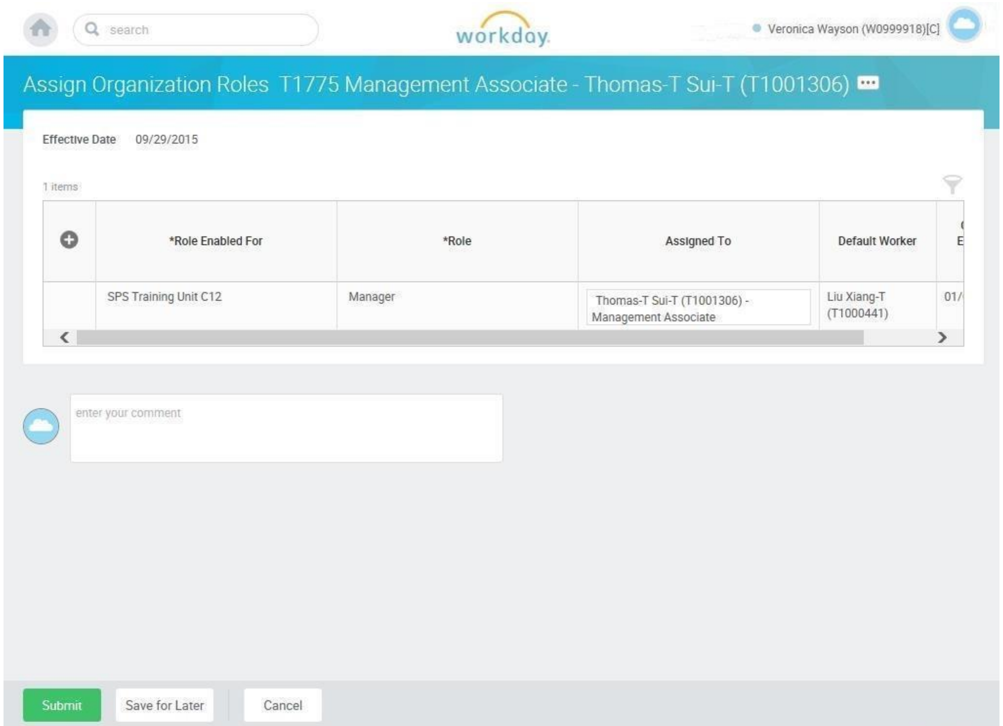
Assign Organization Roles



5. Click the **OK** 

button.

Assign Organization Roles



Determining if roles need to be reassigned to another worker:

- When there are no rows, the worker does not have any roles assigned. In this scenario, you would not need to assign roles to another worker. You can click **Cancel**.
- When a worker is assigned roles, there will be a row for each role that the worker is assigned listed by supervisory organization. In this scenario you should review the **Default Worker** column to review any other workers that would carry out the role in the departing worker's absence. If you determine that a role assignment is necessary, then follow the steps below.

6. Click in the Assigned to column and type the name of the worker for whom you want to assign the role.
7. Click the Submit 

button once the appropriate names are populated in the Assigned To column.
8. Click the **Done** 

button.
9. The System Task is complete

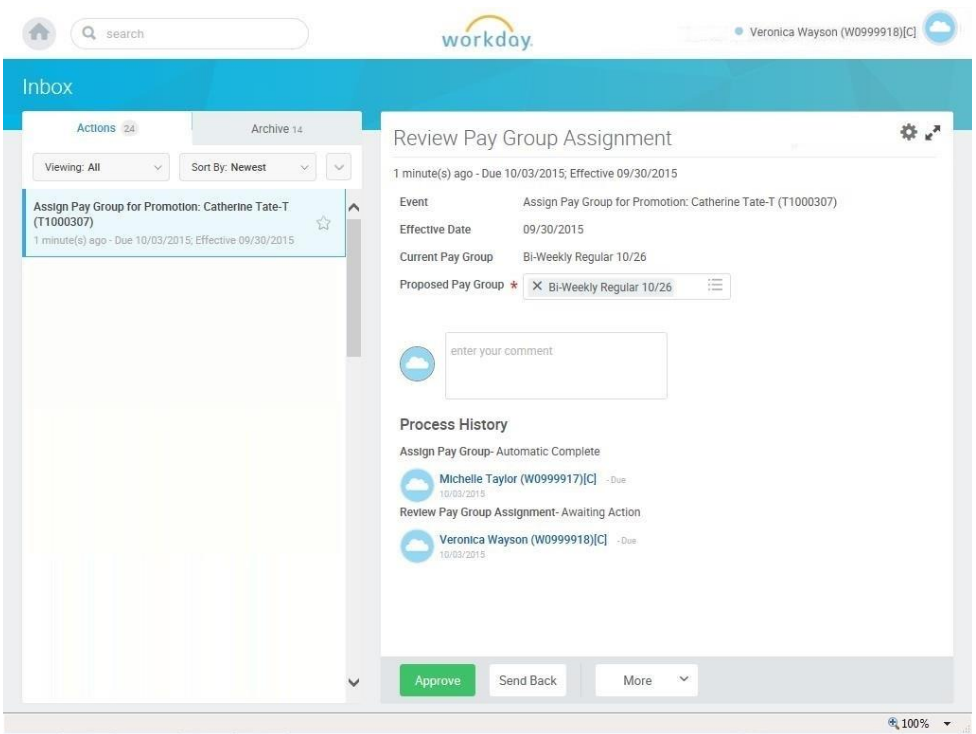
Assign Pay Group

The Assign Pay Group task requires you to view the default pay group (i.e., Biweekly, Biweekly – Contractual, or Monthly) and change it, if necessary.

Procedure:

1. Click the **Inbox** icon.
2. Click on the Inbox hyperlink to view the action items in the inbox.

Inbox



3. Click the appropriate task in your inbox. HINT: The task name includes "Assign Pay Group for...." and includes the worker's name and employee ID.
4. Click on the arrows icon to expand the inbox.
5. Verify the default pay group. If needed, use the prompt to enter the Proposed Pay Group.

Information: The Proposed Pay Group is the defaulted pay group that is associated with the previous position. Review the pay group and modify it if necessary.

6. Click the **Approve** Approve button.
7. Click the **Done** Done button.

Tip: After completing a task in the business process, you can view the next steps.

- Click the arrow next to **Details and Process** to expand the section.
- Click the **Process** tab to see the path that the process will take.
- See the *Check the Status of a Business Process* section of this guide for details on how to view, access or complete other tasks in the process.

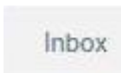
8. The System Task is complete.

Check the Status of a Business Process

The status of a business process event can be checked at any time by going to the **Archive** tab within the inbox of the person who initiated the event.

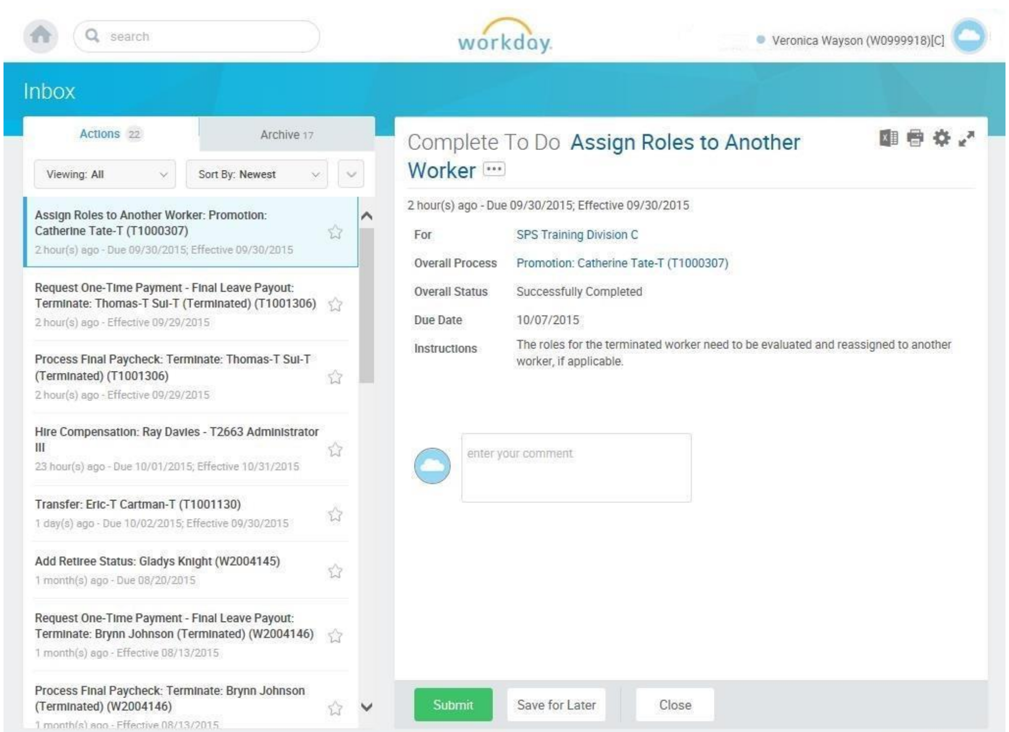
The procedure to check the status of a business process event follows.

Procedure:

1. Click the **Inbox**  icon.
2. Click the **Inbox** 

hyperlink.

Inbox



3. Click the **Archive** 

tab.

Information: The Archive tab shows all items by you. You can select an item and view the status on the right hand side of the screen.

4. Select the item for which you want to view the status.

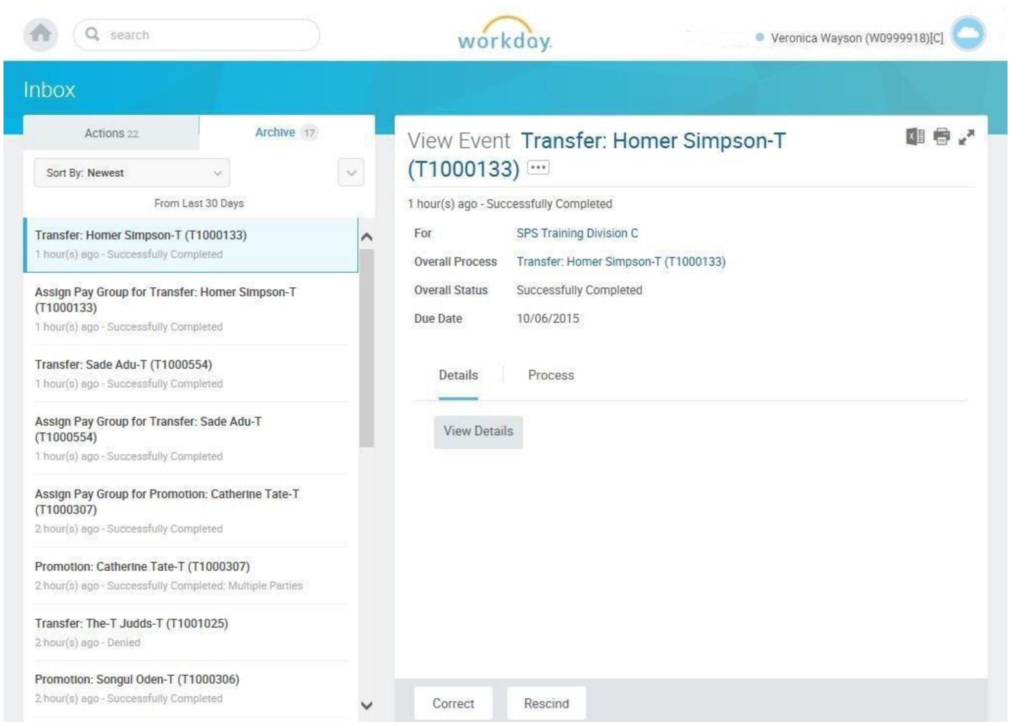
5. Review the transaction details on the Details Details tab, if desired.

6. Review the Overall Status Overall Status field at the top-left side of the transaction page.

Information: The overall status of a business displays a:

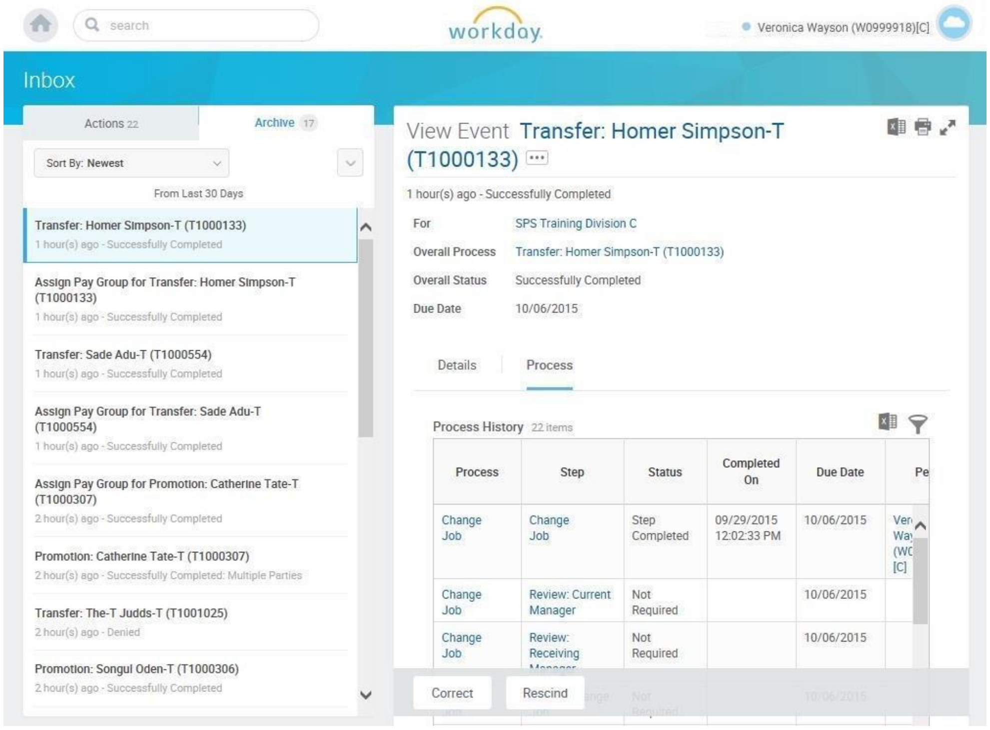
- "Successfully Completed" when required steps in the process have been completed.
- "In Progress" when there are some tasks awaiting action by someone in the business process routing.

Inbox



7. To view the status of individual tasks in a business process, click the Process Process tab.

Inbox



8. Review the status, which steps have been completed/not completed, and who has the step for the action.

9. The System Task is complete.