

How to Initiate a Transfer, Promotion/Demotion or Change Job in Workday

PURPOSE

The **Job Change – Transfer, Promote or Change Job** process in Workday is used when an employee changes primary position due to:

- Transfer
- Lateral/Demotion/Promotion
- Full-time to Part-time/Part-time to Full-time
- Regular to Interim/Interim to Regular/Temporary to Regular

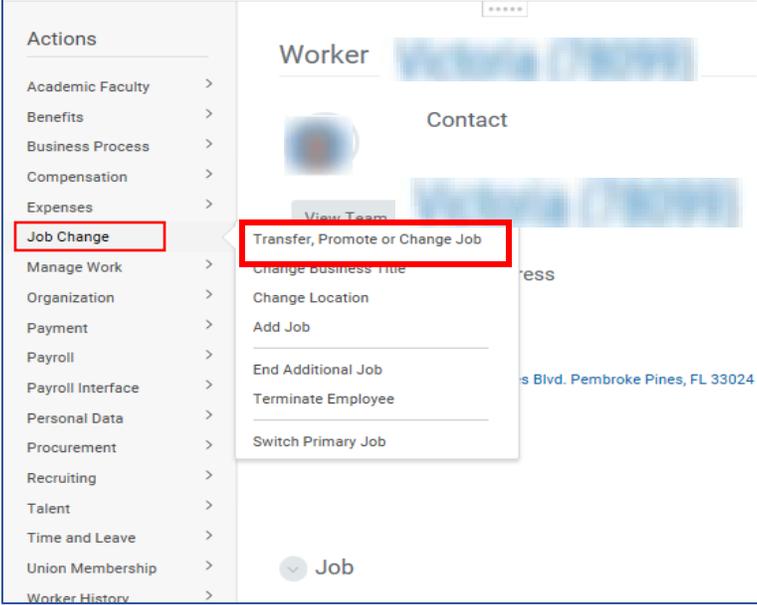
This process must be initiated by the new manager that employee will report to after the change.

PROCEDURE

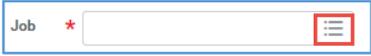
Note	If you are initiating this process for an adjunct transferring to a Full-time regular to Full-time temporary position, then follow the steps listed below and remember to manage period activity pay to remove current courses and add as load in BConnect
Step 1	Login to Workday
Step 2	Type the name of the employee in the search field at the top of the screen and click enter 
Step 3	Click on Actions button next to employees name 

Continued

Step 4 Select **Job Change > Transfer, Promote or Change Job**
 Illustration for submitting a Job Change for a worker in **your** supervisory org:



Step 5 You may be prompted to select the **Job** for worker. If so, select employee’s primary job by clicking on the prompt  icon



Note Select employee’s current primary position, not the position you want to move the person into

Step 6 Click **OK**

Step 7 Review the information listed on the *Start* screen
 Click on the pencil icon  to enter or modify information (**Note:** A red asterisk (*) denotes a required field)

Field	Description
When do you want this change to take effect	The beginning of the next pay period defaults in. If a different effective date is desired, click on the pencil icon  and edit



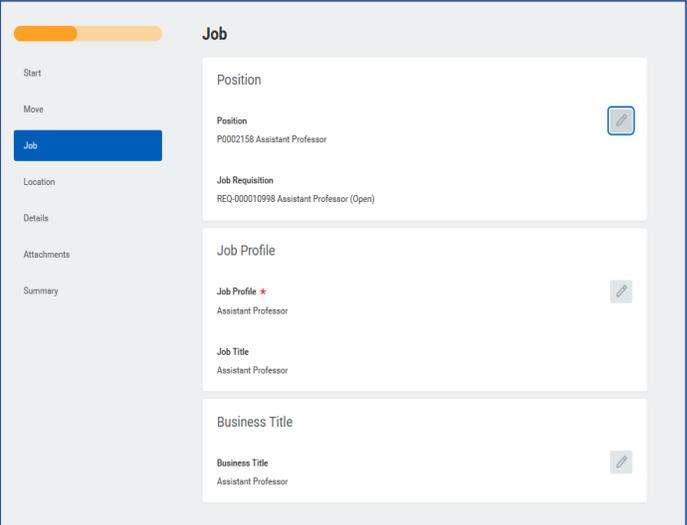
Why are you making this change	Click on the prompt ☰ icon and select an appropriate reason for the job change																						
	<table border="1"> <thead> <tr> <th>Reason</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Transfer</td> <td>a change to supervisory organization with no change in job band</td> </tr> <tr> <td>Change Location</td> <td>a change to a different location only</td> </tr> <tr> <td>Promotion</td> <td>a change to a higher job band</td> </tr> <tr> <td>Demotion</td> <td>a change to a lower job band</td> </tr> <tr> <td>Lateral</td> <td>a change in title with the same band</td> </tr> <tr> <td>Full-time to Part-time</td> <td>a change of status from full-time to part-time</td> </tr> <tr> <td>Part-time to Full-time</td> <td>a change of status from part-time to full-time</td> </tr> <tr> <td>Regular to Interim Status</td> <td>a change of status from regular to interim</td> </tr> <tr> <td>Interim to Regular Status</td> <td>a change of status from interim to regular</td> </tr> <tr> <td>Temporary to Regular</td> <td>a change of status from temporary to regular</td> </tr> </tbody> </table>	Reason	Description	Transfer	a change to supervisory organization with no change in job band	Change Location	a change to a different location only	Promotion	a change to a higher job band	Demotion	a change to a lower job band	Lateral	a change in title with the same band	Full-time to Part-time	a change of status from full-time to part-time	Part-time to Full-time	a change of status from part-time to full-time	Regular to Interim Status	a change of status from regular to interim	Interim to Regular Status	a change of status from interim to regular	Temporary to Regular	a change of status from temporary to regular
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	<p>Which team will this person be on after this change</p> <p>Where will this person be located after this change</p>	<p>If there is no change, verify that the information is correct; If there is a change, use the pencil icon  to edit</p>
	<div data-bbox="634 516 1235 1052" style="border: 1px solid #ccc; padding: 10px;"> <p>Start</p> <p>Start Details</p> <p>When do you want this change to take effect? * ↶ ✓</p> <p>08 / 15 / 2019 <input type="text"/></p> <p>Why are you making this change? *</p> <p>X Part Time to Full Time <input type="text"/></p> <p>Who will be the manager after this change?</p> <p><input type="text"/></p> <p>Which team will this person be on after this change?</p> <p><input type="text"/></p> <p>Where will this person be located after this change? *</p> <p>X South Campus <input type="text"/></p> <p>Do you want to use the next pay period?</p> <p><input type="checkbox"/></p> </div>	
Step 8	Click Start	
Note	If the job change reason is a promotion or demotion, please ensure you have already worked with Compensation to establish a new job profile/description	
Step 9	Review and verify all the information entered	
Step 10	Click Next	

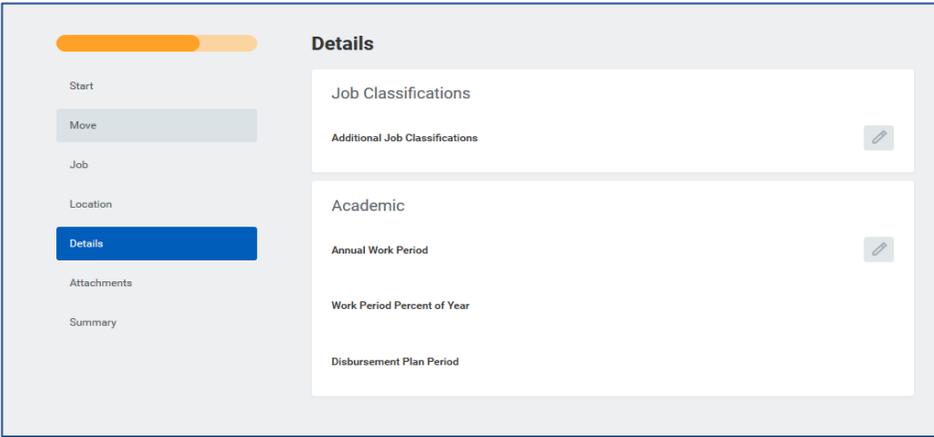
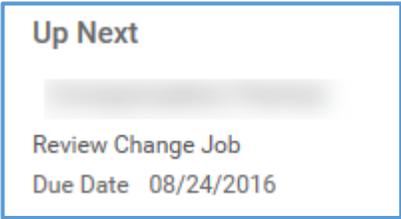


Step 11	<p>Review the information listed on the <i>Job</i> screen</p> <table border="1" data-bbox="358 268 1511 737"> <tr> <td data-bbox="358 268 662 485">Position</td> <td data-bbox="662 268 1511 485">If the person is changing positions, click the pencil  icon to enter the new position here. Note: if you do not see the new position in the drop down, ensure a Job Requisition has been completed and the position is in the Staffing tab of your supervisory organization with an effect date not after the job change date</td> </tr> <tr> <td data-bbox="358 485 662 527">Job Requisition</td> <td data-bbox="662 485 1511 527">Populates automatically based on the position selected</td> </tr> <tr> <td data-bbox="358 527 662 590">Close the Current Position</td> <td data-bbox="662 527 1511 590">Leave Blank</td> </tr> <tr> <td data-bbox="358 590 662 737">Is the current position available for overlap</td> <td data-bbox="662 590 1511 737">Check box if the position will be filled by two employees simultaneously for training (succession) or other purposes prior to the incumbent’s job change date</td> </tr> </table> <p style="text-align: right;">Continued</p>	Position	If the person is changing positions, click the pencil  icon to enter the new position here. Note: if you do not see the new position in the drop down, ensure a Job Requisition has been completed and the position is in the Staffing tab of your supervisory organization with an effect date not after the job change date	Job Requisition	Populates automatically based on the position selected	Close the Current Position	Leave Blank	Is the current position available for overlap	Check box if the position will be filled by two employees simultaneously for training (succession) or other purposes prior to the incumbent’s job change date
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	<div style="display: flex; justify-content: space-around;"> <div data-bbox="354 852 748 1241">  </div> <div data-bbox="813 852 1500 1377">  </div> </div>
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Step 12	Click Next
Step 13	Under Location Details on <i>Location</i> screen, review the Location, Work Space and verify Scheduled Weekly Hours . Use the pencil  to edit if needed
Step 14	Click Next



<p>Step 15</p>	<p>Review the Details. You should not have to make any adjustments because the data is based on the position the person is transferring into. If an item does not look correct, please contact the Compensation department</p> 
<p>Step 16</p>	<p>Click Next</p>
<p>Step 17</p>	<p>Scroll to bottom of page, <i>Attachment</i> screen appears , click Select files to attach document (e.g. justification memo, updated organizational chart, etc.) for the job change</p> <p>Please refer to Attachment job aid for detailed procedure on how to attach document</p>
<p>Step 18</p>	<p>Click Submit</p>
<p>Step 19</p>	<p>Review and verify all the information entered</p>
<p>Step 20</p>	<p>Enter detailed Comments (required)</p>
<p>Step 21</p>	<p>Click Submit</p>
<p>Up Next</p>	<p>Next screen appears with the next approver</p> 



Approval Path & Remaining Process

Click on > icon to expand **Details and Process** and click on **Process** tab to view the progress of the approval path and the remaining process

For	Doe, James (99587)
Overall Process	Process
Overall Status	In Progress
Due Date	04/06/2016
Details Process	