Workday Job Aid for Managers

Change Job

Use this process to make a job change.
(See list of change options on page 2.)

To learn more about Workday, find job aids and videos at the Workday Help website at workday.trinity-health.org.

For additional assistance, contact your Tier 1 resource, as noted on the Workday Help website at workday.trinity-health.org.

Updated as of June 2, 2016
Change Job

Business Process Steps and Roles

As a manager, you may initiate the Change Job process for your team members only. After you initiate, the process will be completed through the HR and Payroll functions (see page 10).

NOTE: You should initiate the Change Job process; however, when necessary, it may be initiated by an HR Partner, HR Representative, or HR Shared Services (HRSS) Representative.

When to Use

Managers use this process to initiate any of the following changes:

• Change Location
• Hours Change
• Interim Assignments
• Job Reclassification
• Move to Another Manager/Position
• Promotions (for career progression or passed boards)

NOTE: Talent Acquisition will initiate the process for the following types of changes:

• Transfers to another manager in another company
• Promotions other than career progression or passed boards
• Demotions

Related Reports

• Critical Open Positions
• Trending Time to Fill Critical Positions

Before You Start

Ensure local policies and procedures have been followed and appropriate approvals have been received before making changes. This may include:

- Manager identifies a need for a job change and works with HR Partner or HR Representative to select the appropriate reason (e.g., understand difference between an interim assignment vs. an additional job or edit position vs. change job)
- Manager discusses change with colleague
- Receiving manager approves change
- HR completes any other necessary steps (e.g., create position, generate offer letter)
- Colleague accepts role/change

TRANSITION PHASE NOTE:

If a colleague is transferring to a Trinity location that is not yet on the Workday system, use the Termination process and choose Voluntary – Transfer to Non-Workday Affiliate from the Primary Reason choices. See the Termination job aid for more information.
Change Job

Data Needed for Change Job

The following data will be required:

- **Worker**: Name of colleague for whom the change will occur
- **Job**: Job that will change if colleague has more than one job
- **Date of Change**: Will default to start of next pay period
- **Change**: Choose from menu options
- **Manager/Team**: Name of manager/supervisory org, if changing
- **Location**: Where colleague will move to, if changing
- **Position**: Open position, if changing
- **Compensation**: Confirm or update compensation rate
- **Other Details of Change**: May include: Company, HR Organization, Work Shift, etc.

**NOTE**: While adding comments where indicated may be helpful for the process, please note that comments are auditable and therefore should be appropriate for the section.

Notifications

(a colleague or department should be notified outside of the Workday system)

- No notifications.

Coming in Phase 2

- None.

Variations

- There may be variations by Health Ministry to the process before the Change Job process is initiated.

Other Resources

- Contact your Tier 1 resource, as noted on the Workday Help website at [workday.trinity-health.org](http://workday.trinity-health.org).
Change Job

**Process Steps**

1. Log in to Workday
2. Click **My Team**

3. At the bottom of the screen, hover over the colleague for whom the change is happening and click the **prompt icon ("brick")**

**Alternate Starting Steps:**

1. Type **change job** in the search box and press **Enter**
2. Click **Change Job** from the search results
3. Type the **name of the colleague** for whom the change is happening
4. Click **OK**
5. Continue at step 6
Change Job

Process Steps (continued)

4. Click **Job Change** and then **Transfer, Promote or Change Job**

5. Click the **edit icon** to complete the Change Job form (* indicates required information)

**HINT:** If the colleague has more than one job, you will also need to choose which job the change is for.
Change Job

**Process Steps (continued)**

6. Complete the Change Job form (* indicates required information)

**Start Details**

- **When do you want this change to take effect?**
  - 04 / 10 / 2016

- **Why are you making this change?**

**WHAT IS THIS?**

- **When do you want this change to take effect?**
  - Date for change; defaults to start of next pay period

- **Why are you making this change?**
  - Choose from menu options (see list on right)

**JOB CHANGES**

- Change Location
- Hrs Change - Benefit Ineligible
- Hrs Change - FT to PT
- Hrs Change - Move to Per Diem
- Hrs Change - No Status Change
- Hrs Change - PT to FT
- Interim Assignment
- Interim Assignment End – No Longer Acting
- Job Reclassification
- Move to Another Manager (Reporting Relationship Change)
- Move to Another Position on My Team
- Promotion - Career Ladder (Career Progression)
- Promotion - Passed Boards

**NOTE:** To change the Company, Cost Center, Religious Order, or HR Company, please use the Change Organization process (see Change Organization job aid on the Workday Help website at [workday.trinity-health.org](http://workday.trinity-health.org)).

**SCREEN INSTRUCTIONS**

CONTINUE ON NEXT PAGE

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Process Steps (continued)

7. Complete the Change Job form (continued) (* indicates required information)

8. Click Start

Who will be the manager after this change? If manager is changing, type new manager's name here

Which team will this person be on after this change? If team is changing, type new supervisory org here

Where will this person be located after this change? If colleague is moving, new location where position will physically sit (Health Ministry plus location)

NOTE: If you change the colleague's manager, you will see fewer of the screens described on page 9. Workday assumes the receiving HR Partner will have most of the information needed for the change, and he/she will need to make those updates in the review stage.

NOTE: Change defaults to start of the next pay period. To start at another date, enter the specific date above and uncheck this box under Details.
Process Steps (continued)

9. Click the **edit icon** to make all applicable updates based on the job change throughout this form *(see NOTE)* (* indicates required information*)

**NOTE:** There are three ways to move through this form:

1. **TOP DROPDOWN MENU**  
   - Click the arrow for the menu of screens.

2. **FORWARD/BACK ARROWS**  
   - Click the forward or back arrow to move through the screens.

3. **NEXT BUTTON**  
   - Move through the screens by clicking **Next**.

**NOTE:** The screens you see will be dependent on the change you choose.

To learn more about these screens, go to next page.

HINT: If your viewing screen is wide enough, this menu may show on the left side of the screen.

Initiate Change Job
### Change Job

#### Process Steps (continued)

**ABOUT THE JOB CHANGE SCREENS**

<table>
<thead>
<tr>
<th>Description (what you can change, as applicable)</th>
<th>Move</th>
<th>Job</th>
<th>Location</th>
<th>Details</th>
<th>Attachments</th>
<th>Organizations</th>
<th>Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose what you want to do with opening left on the team</td>
<td>Choose the new position from this screen or click a box to create a new position</td>
<td>Choose the new position from this screen or click a box to create a new position</td>
<td>Edit position, job profile, and job title; note if current position will be closed</td>
<td>Edit location, scheduled weekly hours, and work shift</td>
<td>Edit/add job classification(s), employee type and time type</td>
<td>Upload attachments</td>
<td>Edit company, cost center, religious order, HR company, financial organization, absence group exception, and pay rule</td>
</tr>
</tbody>
</table>

**Special Notes**

Only appears if the job change includes a move (e.g., manager change, location change)

<table>
<thead>
<tr>
<th>DO NOT USE (do not alter these fields)</th>
<th>Business Title (should match Job Title)</th>
<th>N/A</th>
<th>N/A</th>
<th>Company Insider Types</th>
<th>N/A</th>
<th>N/A</th>
<th>Salary</th>
<th>Allowance</th>
</tr>
</thead>
</table>

**For More Information**

- See Create Position or Hire job aid
- See Create Position or Hire job aid
- See Create Position or Hire job aid
- See Create Position or Hire job aid
- See Create Position or Hire job aid
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**HOW TO MAKE CHANGES:**

- Click the edit icon to open
- Click the checkmark icon to accept changes

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*Updated as of June 2, 2016*
Change Job

Process Steps (continued)

10. Review the information on the Summary page and click **Submit**

11. Process moves to next step; click **Done**

**HINT:** Items that changed will have a blue dot in front and will be noted with words such as “added” or “was” with the former information.
Change Job

Process Steps (continued)

Process continues through the HR and Payroll functions as follows:

<table>
<thead>
<tr>
<th>Step</th>
<th>Process Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Change Job</td>
<td>HR Partner</td>
</tr>
<tr>
<td>Approve Compensation Change</td>
<td>HR Leader</td>
</tr>
<tr>
<td>Review Change Job</td>
<td>HR/HRSS Representative</td>
</tr>
<tr>
<td>Review Organization Assignment</td>
<td>HR Partner</td>
</tr>
<tr>
<td>Verify Licenses and Certifications</td>
<td>HR/HRSS Representative</td>
</tr>
<tr>
<td>Offboarding Procedure</td>
<td>HR/HRSS Representative</td>
</tr>
<tr>
<td>PTO/Sick Transfer or Payout</td>
<td>Time Off Partner</td>
</tr>
<tr>
<td>PTO Accrual Eligibility</td>
<td>Absence Partner Lite/ Leave Partner</td>
</tr>
<tr>
<td>Validate Pay Group and Taxes</td>
<td>Payroll/Lite Partner</td>
</tr>
<tr>
<td>Manage Business Processes</td>
<td>HR/HRSS Representative</td>
</tr>
<tr>
<td>Maintain Employee Contract</td>
<td>HR/HRSS Representative</td>
</tr>
<tr>
<td>Review Benefit Change</td>
<td>Benefits Partner</td>
</tr>
<tr>
<td>Review Employee Contract</td>
<td>Recruiter</td>
</tr>
</tbody>
</table>

NOTES:
- Steps will vary based on the change being made. All steps may not be required.
- The process may be returned to you if there are questions or issues.

For additional assistance, contact your Tier 1 resource, as noted on the Workday website.

Process roles are designated by “security role,” which do not reflect actual job titles.
Change Job

Process Steps (continued)

1. Log in to Workday
2. Click **Inbox**

3. Find the email and click to open (opens in the right pane of the screen)

**NOTE:**
- This is performed by the receiving manager (if applicable).
- Do not click submit until all onboarding activities are completed.
Change Job

Process Steps (continued)

4. Read Instructions and act; type comments

![Image of a UI with instructions]

5. Click Submit

6. The next step is dependent on the change; click Done

![Image of a UI with a checkmark and Done button]
Change Job

Process Steps (continued)

Process continues through the HR function as follows:

<table>
<thead>
<tr>
<th>Step</th>
<th>Process Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove User-Based Security Groups</td>
<td>Security Partner</td>
</tr>
</tbody>
</table>

*Process roles are designated by “security role,” which do not reflect actual job titles.*

**NOTE:** Steps will vary based on the change being made. All steps may not be required.

To learn how to check the status of the process, go to page 16.

For additional assistance, contact your Tier 1 resource, as noted on the Workday website.
Change Job

End of Process: Next Steps

WHEN CHANGE JOB PROCESS IS COMPLETE

- If applicable, Receiving Manager confirms with Sending Manager when process is complete, and they work together to finalize transition (e.g., performance, goals, development)
- If applicable, Manager(s) communicate change to team (e.g., announce promotion or change in staff)
- If applicable, Sending Manager contacts HR Partner to begin backfill process
- If applicable, Colleague enrolls in or changes benefits
Quick Tip: Check the Status of a Process

How to Check the Status of a Process

1. Log in to Workday
2. From Inbox, click the Archive tab
3. Find the item you wish to view and click to open (opens in the right pane of the screen)
4. Click Process

View steps Completed or Awaiting Action

Click Remaining Process to view upcoming steps

Updated as of June 2, 2016
Quick Tip: View Team Member History

How to View a Team Member’s History

1. From the My Team or My Org Chart screen, click the name of the team member

2. Click the menu and item to see team member’s information or history