# Workday Job Aid

## HR: Change Job

### Description
This process is to make a change to a colleague’s job based on one of the reasons listed below.

### When to Use
Use this process to make any of the following changes:
- Demotions (decrease in responsibility)
- Promotions
- Hours Change
- Change Location
- Interim Assignments
- Job Reclassification
- Move to Another Manager/Position

**NOTE:** For the following changes, please use the process detailed in the Change Organization job aid:
- Company
- Cost Center
- Religious Order
- HR Company
  - Financial Organization
  - Absence Group Exceptions
  - Pay Rule

### Related Reports
- Critical Open Positions
- Trending Time to Fill Critical Positions

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Business Process Steps and Roles

Process roles are designated by “security role,” which do not reflect actual job titles. People may have multiple roles. (Preferred initiators listed first.)

- **Initiate Change Job:** HR Partner, HR Representative, HR Shared Services (HRSS) Representative, or Manager
- **Review Change Job:** HR Partner
- **Change Activities** (table below):

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

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

**ROLE:**

- **HR Representative/HRSS Representative/Manager**
- **HR Partner**
- **Various Roles (see table at left)**

**Workday Job Aid: Change Job**

*Updated as of April 21, 2016*
HR: Change Job

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
- 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

Data Needed for Create Position

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
- **Pay Rate Type**: Choose Hourly
- **Compensation**: Confirm or update compensation rate
- **Other Details of Change**: May include: Company, HR Organization, Work Shift, etc.

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).

SPECIAL 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.

Updated as of April 21, 2016

Workday Job Aid: Change Job
Process Steps

Which role(s) can do this step?
- HR Partner
- HR Representative
- HRSS Representative
- Manager

1. Log in to Workday
2. Type **change job** in the search box and press **Enter**
3. Click **Change Job** from the search results

Alternate Starting Steps:
1. Type the colleague’s name in the search box and press **Enter**
2. Click the related actions icon (‘brick’)
3. Choose **Job Change**
4. Click **Transfer, Promote or Change Job**
5. Continue at step 6
Process Steps (continued)

4. Type the **name of the colleague** for whom the change is happening

5. Click **OK**

6. 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.
Process Steps (continued)

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

   - 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 below)

   - 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: Change defaults to start of the next pay period.
     To start at another date, enter date above and uncheck this box under Details.

8. Click Start

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JOB CHANGES

Demotion – Decrease in Responsibility
- Benefit Ineligible
- FT to PT
- PT to FT

Promotion
- Career Ladder (Career Progression)
- FT to PT
- No Ben Change
- Passed Boards
- PT to FT

Hours Change
- Benefit Ineligible
- FT to PT
- Move to Per Diem
- No Status Change
- PT to FT

Others
- Change Location
- Interim Assignment
- Interim Assignment End – No Longer Acting
- Job Reclassification
- Move to Another Manager
- Move to Another Manager in Another Company
- Move to Another Position on My Team

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Workday Job Aid: Change Job

Updated as of April 21, 2016
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.
   - **HINT:** If your viewing screen is wide enough, this menu may show on the left side of the screen.

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**.
### Process Steps (continued)

#### ABOUT THE JOB CHANGE SCREENS

<table>
<thead>
<tr>
<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>Description (what you can change, as applicable)</td>
<td>Choose what you want to do with opening left on the team</td>
<td>Edit position, job profile, job title, and business title</td>
<td>Edit location, scheduled weekly hours, and work shift</td>
<td>Edit job classification, employee type, time type, and pay rate 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>
<tr>
<td>Special Notes</td>
<td>Choose the new position from this screen or click a box to create a new position</td>
<td>Pay Rate Type will be removed for all changes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Only appears if the job change includes a move (e.g., manager change, location change)</td>
<td>See SPECIAL NOTE below</td>
<td>• Compensation will be removed for all changes • If the base pay change is 5% or more, the HR Leader will need to approve</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</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

### HOW TO MAKE CHANGES

**Click the edit icon to open**

**Click the checkmark icon to accept changes**

**SPECIAL NOTE:**
Regardless of the job change, the colleague’s Pay Rate Type and Compensation information will need to be re-entered or changed. To update:

- **From Details screen:** Click the edit icon and update the Pay Rate Type (choose Hourly).
- **From Compensation screen:** Click the restore icon to accept a zero change; if needed, then click the edit icon to change the hourly rate.
Process Steps (continued)

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

11. Process moves to next step; click **Done**
Process Steps (continued)

Which role(s) can do this step?
- HR Partner

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 step will be skipped if the HR Partner completes the Initiate step.

Workday Job Aid: Change Job
**Process Steps (continued)**

4. Review, type **comments**, and click **Approve** or **Send Back** with instructions

**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.

5. Process moves to next step; click **Done**
HR: 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)

**Which role(s) can do this step?**
- HR Leader

**NOTE:** This step will be skipped if the compensation change is less than 5%.

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

Updated as of April 21, 2016
Process Steps (continued)

4. Review the Compensation Change form

5. Type comments and click Approve

6. Process moves to next step; click Done
**Process Steps (continued)**

**Which role(s) can do this step?**
- HR Representative
- HRSS Representative

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:** Steps will vary based on the change being made. This step may not be required.
**Process Steps (continued)**

4. Review, type **comments**, and click **Approve** or **Send Back** with instructions

   ![Image of Workday interface](image)

   **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.

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

   ![Image of confirmation pop-up](image)
HR: Change Job

Process Steps (continued)

Which role(s) can do this step?
• HR Partner

1. Log in to Workday
2. Click Inbox

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

4. Review, type comments, and click Approve or Send Back with instructions

5. Process moves to next step; click Done

NOTE: Steps will vary based on the change being made. This step may not be required.

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.
**Process Steps (continued)**

**Which role can do this step?**
- HR Representative
- HRSS Representative

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:** Steps will vary based on the change being made. This step may not be required.
Process Steps (continued)

4. Read the Instructions and act

   ![Image of instructions]

   **NOTE:** This acts as a notice for the License Certification Partner to verify the colleague has valid licenses and certifications required to perform the job.

5. Type **comments** and click **Submit**

6. The next step is dependent on the change; click **Done, Open, To Do**, or **Skip** (as appropriate)
Process Steps (continued)

Which role can do this step?
- HR Representative
- HRSS Representative

1. Read Instructions and act; type comments

2. Type comments and click Submit

3. The next step is dependent on the change; click Done, Open, To Do, or Skip (as appropriate)

NOTE: Steps will vary based on the change being made. This step may not be required.

NOTE: This gives the Manager the opportunity to confirm all offboarding procedures for the colleague changing jobs.
Process Steps (continued)

Which role(s) can do this step?
- Time Off Partner

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:** Steps will vary based on the change being made. This step may not be required.
Process Steps (continued)

4. Read the Instructions and act

5. Type comments and click Submit

6. The next step is dependent on the change; click Done, Open, To Do, or Skip (as appropriate)

NOTE: This gives the Time Off Partner the opportunity to coordinate the transfer or payout of the colleague’s PTO/Sick based on the job change.
Process Steps (continued)

Which role(s) can do this step?
- Absence Partner Lite
- Leave Partner

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: Steps will vary based on the change being made. This step may not be required.

Updated as of April 21, 2016
Process Steps (continued)

4. Click Maintain Accrual and Time Off Adjustments/Overrides

![Complete To Do PTO Accrual Eligibility](image)

5. Type the name of the colleague for whom the change is occurring

![Maintain Accrual and Time Off Adjustments/Overrides](image)

6. Click OK
Process Steps (continued)

7. Review and make applicable changes under Adjustments or click the **add icon** to add Adjustments

8. Click **Overrides**

9. Review and make applicable changes under Overrides or click the **add icon** to add Overrides

10. Click **OK**; then click **Done** when complete
Process Steps (continued)

11. Type comments and click Submit

12. The next step is dependent on the change; click Done, Open, To Do, or Skip (as appropriate)
Process Steps (continued)

Which role(s) can do this step?
- Payroll Partner
- Payroll Partner Lite

Payroll Validates Pay Group and Taxes

NOTE: Steps will vary based on the change being made. This step may not be required.
Process Steps (continued)

Which role can do this step?
• HR Representative
• HRSS Representative

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: Steps will vary based on the change being made. This step may not be required.
Process Steps (continued)

4. Review Inbox Items Assigned to Worker and make any changes

5. Click Business Processes about the Worker, review, and make any changes
Process Steps (continued)

6. Click **Delegations to the Worker**, review, and make any changes.

7. Type comments and click **Submit**.

8. The next step is dependent on the change; click **Done**, **Open**, **To Do**, or **Skip** (as appropriate).
**Process Steps (continued)**

1. Complete the Maintain Employee Contract form (* indicates required information)

**Screen Instructions**

- **Contract ID**
  - Based on Health Ministry guidelines

- **Contract Start Date**
  - Date contract will begin; auto-populates to change date

- **Contract Type**
  - Choose from menu options (see list below)

- **Status**
  - Choose closed, open, or pending

- **Date Employee Signed**
  - Date colleague signed the contract

**Contract Attachments**

- Click Create Worker Document from menu options to go to an attachment screen

**Contract Description**

- Based on Health Ministry guidelines

**Contract Type**

- **Advanced Practice Professional**
  - Employment Agreement
- **Allied Health Professional**
- **BSN – Agreements**
- **Education Agreement**
- **Employee Loan Repayment**
- **Executive Contract – Employment Agreement**
- **External Liaison**
- **Housing Allowance Contracts**
- **Medical Director Contract**

**Contract Type**

- **Physician Contract – Employment Agreement**
- **Physician Loan Repayment**
- **Relocation Contract**
- **Retention Bonus Contract**
- **Scholarships**
- **Separation Agreement**
- **Sign-on Bonus Contracts**
- **Tuition Loan Agreements**
- **Vendor Contracts**

**Which role(s) can do this step?**

- HR Representative
- HRSS Representative

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

**Date Employer Signed**

- Date employer representative signed the contract

**Contract End Date**

- Date contract will end

**Contract Description**

- Based on Health Ministry guidelines

**Contract Attachments**

- Click Create Worker Document from menu options to go to an attachment screen

Updated as of April 21, 2016
Process Steps (continued)

2. Type comments and click Submit

3. The next step is dependent on the change; click Done, Open, To Do, or Skip (as appropriate)

HINT: Click Add Contract on the event submitted screen to add more than one contract for a colleague.
Process Steps (continued)

Which role(s) can do this step?
- Benefits Partner

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: Steps will vary based on the change being made. This step may not be required.

Which role(s) can do this step?
- Benefits Partner

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: Steps will vary based on the change being made. This step may not be required.

Workday Job Aid: Change Job

Updated as of April 21, 2016
Page 32 of 41
Process Steps (continued)

4. Review Benefit Event Type.
Process Steps (continued)

5. Type **comments** and click **Approve**

![Comment Entry Form]

6. The next step is dependent on the change; click **Done**, **Open**, **To Do**, or **Skip** (as appropriate)

![Success Message]

**Updated as of April 21, 2016**
**Process Steps (continued)**

Which role(s) can do this step?
- Recruiter

1. Log in to Workday
2. Click **Inbox**
3. Find the email and click to open (opens in the right pane of the screen)
4. Review, type **comments**, and click **Approve** or **Send Back** with instructions
5. The next step is dependent on the change; click **Done**, **Open**, **To Do**, or **Skip** (as appropriate)

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

Updated as of April 21, 2016
Process Steps (continued)

Which role(s) can do this step?
- Receiving Manager

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:** Steps will vary based on the change being made. This step may not be required.
**Process Steps (continued)**

4. Read the Instructions and act

![Image of Onboarding Procedures](image)

**NOTE:** This gives the Manager the opportunity to confirm all onboarding procedures for the colleague.

5. Type comments and click Submit

6. The next step is dependent on the change; click Done, Open, To Do, or Skip (as appropriate)
Process Steps (continued)

Which role(s) can do this step?
• Security Partner

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:** Steps will vary based on the change being made. This step may not be required.

Updated as of April 21, 2016
Process Steps (continued)

4. Click **Assign User-Based Security Groups for Person**

5. Type **the name of the colleague** who is changing jobs

6. Choose the **appropriate name**

7. Click **OK**

**IMPORTANT:** Workday shows various iterations of a colleague. Choose the one that includes an employee number.
**Process Steps (continued)**

8. Click the X next to any User-Based Groups to remove from the colleague AND/OR click the prompt icon to add User-Based Groups

9. Click **OK**

10. Click **Done**

11. Type **comments** and click **Submit**

12. Process is complete; click **Done**
End of Process: Next Steps

WHEN CHANGE JOB PROCESS IS COMPLETE

- HR Representative follows other onboarding procedures, as applicable