**HR: Change Organization Assignment**

**Description**
This process allows you to change the organization assignment (e.g., company, cost center) for individual colleagues and/or a group of colleagues simultaneously. Specifically, when the supervisory organization would remain the same (i.e., the manager is staying the same).

**When to Use**
Use this process to change organization for colleagues.
- Individual Colleague
- Group of Colleagues by Organization

**NOTE:** This business process is not intended for changing the status of a colleague (e.g., full to part time, weekly hours, work shift).

**Related Reports**
- Worker’s Job History
- Worker Change History Report
Business Process Steps and Roles

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

- **Initiate Change Organization Assignment:** HR Partner, HR Representative, HR Shared Services (HRSS) Representative, or Manager

- **Review Organizational Assignments:** HR Partner

- **Change Updates** (table below):

<table>
<thead>
<tr>
<th>Step</th>
<th>Process Roles</th>
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</thead>
<tbody>
<tr>
<td>PTO Accrual Eligibility (if applicable)</td>
<td>Absence Partner/Lite</td>
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<tr>
<td>Validate Pay Group and Taxes (if applicable)</td>
<td>Payroll Partner/Lite</td>
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<td>Change Benefit Elections (if applicable)</td>
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**NOTE:** You can also change organization for a colleague(s) by organization. See page 16 for more information.

Change Updates steps are done only if applicable.

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Updated as of April 21, 2016
Before You Start

Ensure local policies and procedures have been followed and appropriate approvals have been received before beginning the Change Organization Assignment process. This may include:

- Manager receives request for organization assignment change

Data Needed for Change Organization Assignment

The following data will be required:

- **Colleague Name**: Name of colleague being moved
- **Effective Date**: Date organization change will be effective
- **Company**: Company colleague will be moved to
- **Cost Center**: Cost center colleague will be moved to
- **Religious Order**: Religious Order colleague will be moved to
- **HR Company**: HR Company colleague will be moved to
- **Financial Organization**: Financial Organization colleague will be moved to
- **Absence Group Exceptions**: Sick/Illness, PTO, and other leave groups which will apply for colleague
- **Pay Rules**: Pay rule colleague will be moved to

Notifications

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

- No notifications

Variations

- There are variations in local businesses/financial requirements

Other Resources

- Contact your Tier 1 resource as noted on the Workday website at 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.
**Process Steps**

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

1. Log in to Workday

2. Type the **name of the colleague** for whom the organization will be changed in the search box and press **Enter**

**NOTE:** To change organization for multiple colleagues by organization, see page **16**.

**SHORTCUT:** When you start typing in the search box, options appear as you type. Click the option here rather than continuing to the Search Results screen.
**Process Steps (continued)**

3. From the search results, click the related actions icon ("brick") that appears next to the colleague's name.

4. Click **Organization**, then click **Change Organization Assignments**.

5. Type the **effective date** in the Change Organization Assignments form (*indicates required information)*.

6. Click **OK**.
Process Steps (continued)

7. Make applicable changes in the Change Organization Assignments form

To find information on the companies and cost centers, contact the RHM Accounting/Payroll Dept.
**Process Steps (continued)**

8. Make applicable changes in the Change Organization Assignments form *(continued)*

9. Type **comments** and click **Submit**

10. Process continues 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)
4. Review and click Approve or Send Back with instructions

5. Based on change, process is either complete or moves to next step; click Done
Process Steps (continued)

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

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 change does not affect the colleague’s PTO accrual.

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

PTO Accrual Eligibility

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

4. Click **Maintain Accrual and Time Off Adjustments/overrides**

![Maintain Accrual and Time Off Adjustments/Overrides](image1)

5. Type the **name of the colleague** for whom the organization is being changed

![Maintain Accrual and Time Off Adjustments/Overrides](image2)

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

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

Payroll Validates Pay Group and Taxes

NOTE: This step will be skipped if the change does not affect the colleague’s pay group or taxes.
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?
- Benefits Partner

**NOTE:** This step will be skipped if the change does not affect the colleague’s benefit elections.

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End of Process: Next Steps

WHEN CHANGE ORGANIZATION ASSIGNMENT PROCESS IS COMPLETE

- Colleague’s organization change and any related change
Process Steps

CHANGING THE ORGANIZATION OF MULTIPLE COLLEAGUES

1. Log in to Workday
2. Type change org in the search box and press Enter

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

NOTE: This process can be used to move multiple colleagues to the same new organization.

SHORTCUT: When you start typing in the search box, options appear as you type. Click the option here rather than continuing to the Search Results screen.
Process Steps (continued)

3. Click **Change Organization Assignments** from the search results.

4. Type the **Effective Date** of the change and the **name of the Supervisory Organization** the colleague will be moved from (the colleague’s current Supervisory Organization).

5. Click **OK**.

**What is a Supervisory Organization? (SUPV ORG)**

Supervisory Organization is the manager hierarchy within Trinity Health. Each person who has colleagues reporting to him/her represents a SUPV ORG. Colleagues or “workers” are members of their people manager’s SUPV ORG.
Process Steps (continued)

6. Complete the Override Organization Assignments form

**WHAT IS THIS?**
- **Company**: Name of Health Ministry
- **Cost Center**: Department or business unit used to track expenses and is responsible for the cost
- **Religious Order**: Employment agreement used to capture affiliation with the religious order (for specific set of colleagues)
- **HR Company**: Code assigned to HR department; ties to Health Ministry
- **Financial Organization**: Business Unit or Process Level; ties to Health Ministry
- **Absence Group Exceptions**: Sick/Illness, PTO, and other leave groups; choose from menu options
- **Pay Rule**: Important for timekeeping system; code that determine this colleague’s timekeeping rules

**SHORTCUT:** To change the organization assignments for all colleagues in the Supervisory Organization, click the checkbox next to **Select All**.

**SCREEN INSTRUCTIONS CONTINUE ON NEXT PAGE**

Click the prompt icon for options

**Change Organization for Colleague by Organization**

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

7. Choose the **positions/colleagues** for whom the organization changes will be made

8. Click **Submit**

9. Process is complete; click **Done**