Use this job aid to fill an open position.

- Page 2: Job Requisition and Post Job
- Page 13: Additional Actions — Job Requisition
- Page 24: Additional Actions — Post Job
- Page 31: Evergreen Requisition
- Page 41: Job Application Process
  *(Reviewing and Choosing Candidates)*
- Page 70: Hire
- Page 108: Change Job

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.
Job Requisition and Post Job
In Workday, a position is a chair, and a requisition is the permission to put a body in that chair. Chairs can be filled for new positions, editing positions (e.g., one FT to two PT) or refilling a vacating/vacated position.

Note that creating a job requisition to refill a position does not change anything for the colleague currently in the position.

**Before You Start**

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

- An open job requisition exists in Workday (Manager initiates the create job requisition process)
- Manager works with Talent Acquisition, as necessary, to confirm need for requisition actions (e.g., changes, freeze/unfreeze, close)
- Manager works with Talent Acquisition as necessary to confirm job posting requirements (e.g., timing)

**Data Needed for Job Requisition and Post Job**

The following data will be required:

- **Job Posting Site**: Determine which job boards the job posting should be added to: Internal, Standard, Nursing, and/or sites posted using Broadbean

**Description**

This section shows the Talent Acquisition steps in creating a requisition, posting a job and how to take actions on existing job requisitions and job postings.

**Notes**

- Managers are responsible for creating job requisitions, coordinating with Talent Acquisition for follow up actions and reviewing candidates.
- Evergreen requisitions (e.g., for sourcing a pool of candidates) will be initiated by Talent Acquisition. See Evergreen Requisition on page 31 for detailed steps.

**Related Reports**

- View Open Positions
- Open Position Summary
- Headcount & Open Position Analysis
- Critical Open Positions

**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.
**Business Process Steps and Roles**

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

**Create Job Requisition**

Managers are responsible for initiating a job requisition. However, managers should coordinate with Talent Acquisition to discuss the requisition, the posting(s), and ongoing candidate activities.

- **Initiate Create Job Requisition:** Manager
- **Review1:** Manager’s Manager
- **Review2:** Primary Recruiter
- **Approve:** Labor Resource Approver
- **Post Job:** Recruiter

**NOTE:** This job aid only shows steps for the Primary Recruiter.

**Additional Actions You Can Take**

**Job Requisitions**

See page 14 for the initial steps to take before starting an action on a job requisition, including:

- Page 15: Edit Job Requisition
- Page 18: View Job Requisition Change History
- Page 19: Manage Job Requisition Freeze (freeze or unfreeze)
- Page 21: Close Job Requisition

**Job Postings**

See pages 25-26 for the initial steps to take before starting an action on a job posting, including:

- Page 27: View Job Posting Details
- Page 28: Update Job Posting
- Page 29: Unpost Job
- Page 30: Add Job Posting(s)
**Process Steps**

1. Log in to Workday
2. Click **Inbox**
3. Find the Job Requisition task and click to open *(opens in the right pane of the screen)*

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

**NOTE:**
This job aid picks up at the Review2 step. For details on the Initiate step, see the Manager job aid: Recruiting Process.
Process Steps (continued)

4. Review the job requisition request; click **Approve** or **Send Back** with instructions

5. Process moves on; click **Done**

**IMPORTANT!**
Be sure to validate hours, job description, and questionnaires.

**NOTE:** If compensation assigned is outside of the job profile’s range, an “error” will appear when you click Approve. This is a caution notice. You may adjust (after conversations with the Manager/Manager’s Manager) or click Approve again to accept the compensation as it is.

**HINT:** To add an additional reviewer(s), click **Add Approvers**.

**NEXT STEPS:**
- Labor Resource Approver approves.
- Process returns to you to Post Job. See next page for instructions.
Process Steps

Which role(s) can do this step?
• Primary Recruiter

1. Log in to Workday

2. Click Inbox

3. Find the Post Job task and click to open
   (opens in the right pane of the screen)
**Process Steps (continued)**

4. Enter the information for one job posting

5. Click the add icon to add another posting site; repeat for each additional site

6. Type comments and click Submit

7. Process continues; click To Do
8. Click **Broadbean Posting Center**

9. On the Broadbean site, click the box next to **every** job board you want to post to OR click the box next to All Sites Below to post to all

**NOTES:**
- You must create the external job postings on Broadbean from this link. If you go past this screen, you will need to Post Job to Broadbean again to access the link.
- Link opens a new window and takes you to the Broadbean website.
- You must be set up as a user to access the Broadbean website.

**NOTE:** The job boards you see will be based on your user access. You may see more job boards than shown here.
Process Steps (continued)

10. Type the details to go in the job posting (* indicates required information)

NOTE: The following job requisition data is mapped to Broadbean:
- Job Reference Number
- Job Title
- Job Location
- Job Description
- Apply Online URL

SCREEN CONTINUES IN NEXT COLUMN

11. Click Continue
Process Steps (continued)

12. Review the job posting and click **Send Advert**

13. When done, return to the Workday window, type any **comments**, and click **Submit**

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

To find information on managing postings on Broadbean, see the Workday Posting Guide.
End of Process: Next Steps

WHEN POST JOB PROCESS IS COMPLETE (as applicable):

- **Create Prospect**: Add candidate information in Workday.
- **Invite to Apply**: Allows recruiter to send job posting link(s) to prospect.
- **Create Job Application**: Add candidate information for a specific job opening.
- When candidates apply to open job postings, the Primary Recruiter will receive tasks in the Workday Inbox, which will kick off the job application process.
Additional Actions for Job Requisition and Post Job
**TA: Job Requisition — Additional Actions**

**Additional Actions You Can Take—Job Requisitions**

Start here to take actions on a job requisition.

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

3. There are two ways to access a job requisition to take additional actions:

   **A. RECENT**
   If your job requisition is recent, it may show up under Recent. Click the **job requisition** to move forward.

4. Then follow the steps for the action to complete:
   - **Page 15:** Edit Job Requisition
   - **Page 18:** View Job Requisition
   - **Page 19:** Manage Job Requisition
   - **Page 21:** Close Job Requisition

**B. VIEW**
- Click **My Open Job Requisitions**
- Click **OK**
- Click the link to the **job requisition** you want to open
EDIT JOB REQUISITION

Use when you need to make changes to an existing job requisition. Start with the instructions on page 14 to get to the point of step 1 below.

1. Click the related actions icon ("brick") next to your existing job requisition

2. Go to Job Change and click Edit Job Requisition

NOTE: You will receive an Unpost Job task in your Workday inbox to approve before you can post the edited job requisition (see step 6).

NOTES:
- Edit Job Requisition process takes about 3 to 5 minutes.
- There are three situations that will require you to close the requisition and ask the Manager to create a new one:
  - If the change is such that it requires new approvals (e.g., compensation).
  - If you need to change the questionnaire(s) AND a candidate has already applied to the requisition.
  - If you need to change the number of openings.
EDIT JOB REQUISITION (continued)

3. You will walk through the job requisition screens (* indicates required information)
   • Click the edit icon to make changes
   • Click Next to move through the screens
   • Type comments and click Submit when complete

4. Click Edit Additional Data or click Skip to skip this step (comment is required to skip)

   **NOTE:** A reason for the update is required (see options from list below).

   • Update Hiring Requirements
   • Update Job Title, Description or Justification
   • Update Qualifications
   • Update Recruiting Start Date
   • Update Target Hire Date

5. Process continues; click Open or click Skip to skip this step (comment is required to skip)

   **NOTE:** If someone other than the Primary Recruiter initiates the Edit, a review step will be added after step 4 (to Primary Recruiter).
6. Process continues; click Open.

7. All job postings will be unposted; type comments and click Submit.

8. Process continues; click Open.

NEXT STEPS: Go to page 8, beginning at step 4, for detailed instructions on posting jobs.
VIEW JOB REQUISITION CHANGE HISTORY

Use to view all changes that have been made to a job requisition. Start with the instructions on page 14 to get to the point of step 1 below.

1. Click the related actions icon ("brick") next to your existing job requisition

2. Go to Job Change and click View Job Requisition Change History

3. Click the Job Requisition Event to see the history and any open or skip items

NOTE: You can only view change history if a change has been made to the job requisition.

NOTE: This only appears as a menu item if a change has been made to the job requisition.

Shows current and prior values

Click to view the details of the job requisition
MANAGE JOB REQUISITION FREEZE

Use to freeze or unfreeze (hold/unhold) a job requisition. Start with the instructions on page 14 to get to the point of step 1 below.

1. Click the related actions icon ("brick") next to your existing job requisition

2. Go to Job Change and click Manage Job Requisition Freeze

3. Complete the Manage Job Requisition Freeze form (* indicates required information)

   IMPORTANT! Click the box for Frozen when you’re freezing the job requisition. Clear the box when you’re unfreezing the job requisition.

   REASON
   - Freeze
     - Hold on recruiting
     - Hiring manager not engaged
     - Position need being reviewed
     - Hiring freeze
   - Unfreeze
     - Hold removed
     - Hiring manager ready to move forward
     - Review complete
     - Hiring freeze removed

   NOTE: If you freeze a job requisition, the requisition will no longer show up under Recent in your Recruiting worklet. You will need to find it through View > My Recruiting Jobs.
**TA: Job Requisition — Additional Actions**

**MANAGE JOB REQUISITION FREEZE (continued)**

4. Type comments and click Submit

5. **If freezing the job requisition:**
   You can unpost the job — click Open to unpost the job or click Skip to leave the job postings

   OR

   **If unfreezing the job requisition:**
   You can repost the job — click Open to post the job or click Skip to leave the current job postings *(if applicable)*

6. Type comments and click Submit

7. Process is complete; click Done *(not shown)*

**NOTE:** If you Skip, your job postings will remain live.

**NEXT STEPS:** Go to page 8, beginning at step 4, for detailed instructions on posting jobs. See page 25 for additional actions you can take on a job posting.
TA: Job Requisition — Additional Actions

CLOSE JOB REQUISITION

Use to close (cancel) a job requisition. Start with the instructions on page 14 to get to the point of step 1 below.

1. Click the related actions icon (“brick”) next to your existing job requisition

2. Go to Job Change and click Close Job Requisition

3. Complete the Close Job Requisition form (* indicates required information)

NOTE: Once you close a job requisition, you cannot reopen it. You can, however, use the related actions icon (“brick”) to copy the job requisition in order to create it again.

- Position no longer planned to be filled at this time
- New requisition submitted — pay grade/job description changed
- Budgetary change
CLOSE JOB REQUISITION (continued)

4. Type comments and click Submit

NOTE: Comment could document why you are closing the job requisition.

5. Process continues; click To Do

6. Read Instructions and act

7. Type comments and click Submit
CLOSE JOB REQUISITION (continued)

8. Process continues; click **Open**

9. Jobs postings will be removed; type **comments** and click **Submit**

10. Process is complete; click **Done**
Additional Actions for Post Job
**TA: Post Job — Additional Actions**

**Additional Actions You Can Take — Job Postings**

Start here to take actions on your job posting.

1. Log in to Workday
2. Click Recruiting

3. There are two ways to access a job requisition to take additional posting actions:
   - **A. RECENT**
     If your job requisition is recent, it may show up under Recent. Click the job requisition to move forward.
   - **B. VIEW**
     - Click My Open Job Requisitions
     - Choose your role and click OK
     - Click the link to the job requisition you want to open
Additional Actions You Can Take — Job Postings

Continued from previous page.

4. Click **Job Postings** in your existing job requisition

Then follow the steps for the **ACTION** you wish to complete:

- **Page 27**: View Job Posting Details
- **Page 28**: Update Job Posting
- **Page 29**: Unpost Job
- **Page 30**: Add Job Posting(s)
VIEW JOB POSTING DETAILS

Use to view the job posting details. Start with the instructions on pages 25–26 to get to the point of step 1 below.

1. Click **Actions** next to the job posting you want to view.

2. Click **View Job Posting Details** (job posting shows in window).

```
<table>
<thead>
<tr>
<th>Job Posting Site Name</th>
<th>Posting Start Date</th>
<th>Posting End Date</th>
<th>Primary Posting</th>
<th>Posting Cost</th>
<th>Posting URL</th>
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<tbody>
<tr>
<td>Internal</td>
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<td></td>
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<td>Broadbean</td>
<td>11/04/2016</td>
<td></td>
<td>Yes</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>
```

**Unpost Job**
- Update Job Posting
- View Job Posting Details
UPDATE JOB POSTING

Use to change the job posting end date. Start with the instructions on pages 25–26 to get to the point of step 1 below.

1. Click **Actions** next to the job posting you want to view and click **Update Job Posting**

2. Choose **End Date** and click **Submit**

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

**NOTES:**
- You can only change the End Date on a job posting.
- If you have multiple job posts, you must open each job posting individually to update them.
UNPOST JOB

Use to unpost a job. Start with the instructions on pages 25–26 to get to the point of step 1 below.

1. Click Actions next to the job posting you want to view and click Unpost Job

2. Type comments and click Submit (Job Posting End Date will be the current date)

3. Process is complete; click Done

NOTE: If you have multiple job posts, you must open each job posting individually to unpost them.
ADD JOB POSTING(S)

Use to add an additional posting(s) for a job. Start with the instructions on pages 25–26 to get to the point of step 1 below.

1. Click Post Job

2. The Post Job process begins; go to page 8 and continue from step 4
Evergreen Requisition
WHAT IS AN EVERGREEN REQUISITION?

An evergreen requisition allows Recruiting to post jobs for a position that may or may not be open currently. Examples for use:

- Source a pool of candidates for a position(s) that is constantly needing to be filled (e.g., nurse)
- Source for a large hiring circumstance (e.g., new hospital opening)
- Provide one campaign/campus event – one link to apply

A candidate may be moved from the evergreen requisition to a specific open job requisition as one becomes available and is considered appropriate.

Before You Start

Ensure local policies and procedures have been followed and appropriate approvals have been received before making changes.

Description

This section shows the steps to create an evergreen requisition and how to take actions on existing evergreen job requisitions.

When to Use

Use this job aid to support the evergreen requisition process. For instructions and details to edit or close an evergreen requisition, see the sections of this job aid starting on pages 13 and 24.

NOTES:

- Evergreen job requisitions are NOT connected to specific open positions.
- It is recommended you not leave evergreen requisitions open for more than six months. You may copy the evergreen requisition and then close the old one in order to “refresh” the requisition and postings.

Related Reports

- Open Positions
- My Candidates
- Find Candidates

SPECIAL NOTE:

You can also Copy Evergreen Requisition from the Job Change menu. This may be helpful if you want to refresh the evergreen requisition (e.g., if it is old). Copy the evergreen requisition as a starting place to create a fresh one, and then close the original.
**Business Process Steps and Roles**

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

**Create Evergreen Requisition**

Managers are responsible for initiating a job requisition. However, managers should coordinate with you (the Recruiter) to discuss the requisition, the posting(s), and ongoing candidate activities.

- **Initiate Evergreen Requisition:** Recruiter
- **Post Job:** Recruiter

**ROLE:**

```
Recruiter
  ┌── Initiate
  │   └── Post Job
```

**Additional Actions You Can Take**

You can take the following actions on an existing evergreen requisition. The steps are identical to Job Requisition Actions; however, they will say “Evergreen Requisition.” See page 14 for the initial steps to take before starting an action on an evergreen requisition, including:

- **Page 15:** Edit Evergreen Requisition
- **Page 18:** View Evergreen Requisition Change History
- **Page 21:** Close Evergreen Requisition
Process Steps

1. Log in to Workday
2. Type create evergreen requisition in the search box and press Enter
3. Click Create Evergreen Requisition
4. Start the Create Evergreen Requisition screen (* indicates required information)
5. Click OK

Initiate Evergreen Requisition

Supervisory Organization
Not required for an evergreen requisition

Worker Type
Choose employee or non-employee (formerly called POI)
**Process Steps (continued)**

6. Click the **edit icon** to complete the Recruiting Information screen (*indicates required information*)

7. Click **Next**

**Recruiting Instruction**
Choose from:
- Post Externally Only
- Posting Not Required
- Post Internally and Externally
- Post Internally Only

**Recruiting Start Date**
Date recruiting may begin

**Target Hire Date**
Date you’d like new hire to begin work

**Target End Date**
DO NOT USE

**NOTE:** You will not be able to Hire before the Target Hire Date.
**Process Steps (continued)**

8. Click the **edit icon** to complete/update Job screen (*indicates required information)*

   - **Job Posting Title**
     Create job posting title to reflect what you want the job posting to say (can be more than just title; marketing)

   - **Job Description boxes**
     Add or review the job descriptions to show on the job posting

   - **Job Profile/Additional Job Profiles**
     Official name of job for compensation purposes; drives Default Compensation (equivalent to current "job code")

   - **Worker Sub-Type**
     Choose from:
     - Casual/Contingent (Seasonal)
     - Intern (Trainee)
     - Regular
     - Temporary (Fixed Term)

   - **Time Type**
     Choose full-time or part-time (choose part-time for "casual" positions)

   - **Primary Location**
     Location where the position resides

   - **Primary Job Posting Location**
     Location to list in the job posting (e.g., Livonia instead of a specific Livonia facility)

   - **Additional Locations/Job Posting Locations**
     Additional locations where the position may reside/post

   - **Scheduled Weekly Hours**
     Calculates FTE

   - **Work Shift**
     The shift to be worked by the colleague; choose from menu options (NOTE: Values are new for the Workday system)

   - **Questionnaire**
     Choose from:
     - Trinity Standard Internal Questionnaire
     - Trinity Standard External Questionnaire

   - **NOTE:** Additional Job Profiles may be useful to fill similar roles (e.g., ER nurse vs. ortho nurse).

9. Click **Next**

**FUTURE ENHANCEMENT:**
Additional questionnaires for specific positions will be added at a later time.
Process Steps (continued)

10. Click the **edit icon** or **Add** to complete/update each section of the Qualifications screen (*indicates required information*)

11. Click **Next**

**FUTURE ENHANCEMENT:** Some Qualifications will be built in based on the Job Profile attached to the position.

**NOTES:**
- You may add more than one qualification for each. Complete one, then click **Add** to add another.
- Qualifications can drive analytics, which will allow for greater talent management in the future.

---

**WHAT IS THIS?**

- **Education**
  - Degree(s) preferred or required
- **Language**
  - Language(s) preferred or required
- **Certifications**
  - Certification(s) preferred or required
- **Responsibilities**
  - Will be used for performance management; options are not job specific
- **Skills**
  - Skill(s) preferred or required *(choose from menu options)*
- **Training Details**
  - Training(s) completed that are preferred or required

---

SCREEN CONTINUES IN NEXT COLUMN
**Process Steps (continued)**

12. Click the **edit icon** to complete/update each section of the Organizations screen (*indicates required information)

13. Click **Next**

**WHAT IS THIS?**

- **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 options if applicable

- **Pay Rule**
  - Important for timekeeping system; code that determine this colleague’s timekeeping rules

**FUTURE ENHANCEMENT:** All positions will eventually have this information added. Please complete as noted below if not auto-populated.
**Process Steps (continued)**

14. Click **Add** to add any attachments (*indicates required information*)

15. Click **Next**

16. Click **Add** to assign the Primary Recruiter

17. Click **Next**

**HINT:** Attachments could include things such as an overview of why requesting position, the job requisition form, etc.

Click the checkmark icon to accept changes.
Process Steps (continued)

18. Review the summary screen; to return to a section, click Guide Me next to that section.

19. Click Submit

20. Process continues; click Open

NEXT STEP: Process moves to Post Job. See page 8 for detailed steps and information.
Job Application Process
(Reviewing and Choosing Candidates)
The process of reviewing and choosing candidates (Job Application) is a dynamic process. This means the steps below DO NOT have to be followed in order. Steps can be skipped or followed in a different order based on the individual circumstances.

This section of the job aid describes how each step of the candidate review and choosing is performed within the Workday system.

<table>
<thead>
<tr>
<th>Step</th>
<th>Process Roles</th>
<th>See page...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review</td>
<td>Primary Recruiter</td>
<td>43</td>
</tr>
<tr>
<td>Screening</td>
<td>Manager; Primary Recruiter</td>
<td>46</td>
</tr>
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<td>Assessment</td>
<td>Primary Recruiter</td>
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<td>Interview</td>
<td>Manager; Primary Recruiter</td>
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<td>Reference Check</td>
<td>Primary Recruiter</td>
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<td>Offer</td>
<td>Primary Recruiter</td>
<td>59</td>
</tr>
<tr>
<td>Background Check</td>
<td>Primary Recruiter; Recruiting Coordinator</td>
<td>66</td>
</tr>
<tr>
<td>Hire</td>
<td>Primary Recruiter</td>
<td>68</td>
</tr>
</tbody>
</table>

**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?
• Primary Recruiter

1. Log in to Workday

2. Click Recruiting

3. There are two ways to access a job requisition:
   
   **A. VIEW**
   • Click My Open Job Requisitions
   • Choose your role and click OK
   • Click the link to the job requisition you want to open

   **B. RECENT**
   If your job requisition is recent, it may show up under Recent. Click the job requisition to move forward.
Process Steps (continued)

4. Click **Review Candidates**

**HINT:** The funnel shows how many candidates are in each stage.
5. Check the box next to each candidate you want to take action on

6. Click Move Forward or choose another option from the More menu

7. Click the prompt icon to choose the stage for the selected candidate(s)

8. Click OK (process moves to the step you select)

NOTE: A questionnaire will not move with a candidate if you move the candidate to another requisition.
Process Steps

Which role(s) can do this step?
• Manager
• Primary Recruiter

1. Log in to Workday
2. Click Inbox
3. Find the Manager Screening task and click to open
   (opens in the right pane of the screen)
4. Contact the candidate to schedule and conduct a phone screening
   (see instructions in yellow box)

To find candidate’s contact and other information:
1. Click Recruiting
2. Click My Candidates
3. Click the related actions icon ("brick") next to the candidate’s name
5. When screening is complete, click your feedback/direction choice

![Screening Image]

**NOTE:** If Manager selects one of the following options, it will forward to the Primary Recruiter for follow up:
- Reviewed – Further Information Needed
- Reviewed – Manager Scheduling Interview
- Reviewed – Recruiter to Schedule Interview
- None of the Above

6. Click **Submit**

7. Process moves on; click **Done**
**Process Steps**

1. Log in to Workday

2. Click **Inbox**

3. Find the Manager Screening task and click to open *(opens in the right pane of the screen)*
Process Steps (continued)

4. Click **Assessment** in the Move Forward menu

5. Click **Assess**

**HINT:** Click on any tab during the job application process to see the candidate’s application information.

**HINT:** If you click **Done** instead of **Assess**, you can access the task from your Workday Inbox.
6. Complete the Assess Candidate form
(* indicates required information)

Click the add icon to add an assessment
Process Steps (continued)

7. Type comments and click Submit

8. Click Assessment Decision

9. Click your choice from the Move Forward or Decline menus (process ends or moves to the step you select)
**Process Steps**

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

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

3. Find the Interview task and click to open
   *(opens in the right pane of the screen)*
**Process Steps (continued)**

4. Add the interviewers and interview dates; click the **add icon** to add additional interviewers.

5. Type **comments** for the interview team.

6. Click **Submit**.

7. Click **Done**.

**NOTE:** Use the arrows to change the order of the interviews.

**NOTE:** Currently Workday does not integrate with your calendar. You will need to add interview appointments to your calendar separately.

Go to next page to see the steps to Rate Interview once the interview is complete.
Process Steps

After interview, Manager provides feedback and direction for the Recruiter.

1. Log in to Workday
2. Click Inbox
3. Find the Interview task and click to open (opens in the right pane of the screen)
**Process Steps (continued)**

4. Choose a rating

5. Type comments with direction for the Recruiter

6. Click **Submit**

7. Click **Done**

Recruiter continues the process, working with the Manager as needed.
**Process Steps**

1. Click **To Do**

   - HINT: If you click **Done** instead of **To Do**, you can access the task from your Workday Inbox.

2. Follow the Instructions provided

   - NOTE: See next page for these step-by-step instructions. You can return to the To Do task from your Workday Inbox after you complete the instructions.

3. Click **Submit**

4. Click **Done**

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

**NOTE:** The Reference Check step may not always appear in the Move Forward menu; follow the instructions on the Step 2 screen below (and detailed on the next page) to perform the task.
TO DO: CHOOSE SKILLSURVEY SURVEY ID

1. Click **Recruiting** on the Workday home page

2. Click **My Candidates – Primary Recruiter**

3. Click the link for the candidate

4. Click **Additional Data** under the Overview tab
5. Click **Edit**

![Edit screen](image1)

6. Click the **prompt icon** to choose a survey

![Prompt to choose survey](image2)

7. Click **OK**

8. Click **Done**

![Done button](image3)
**Process Steps**

1. Log in to Workday

2. Click **Inbox**

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

**Which role(s) can do this step?**
- Primary Recruiter
**Process Steps (continued)**

4. Click **Offer** from the Move Forward menu

5. Click **Open**

**HINT:** If you click **Done** instead of **Open**, you can access the task from your Workday Inbox.
Process Steps (continued)

6. Click the **edit icon** to change any information in the Start form

7. Click **Next**
**Process Steps (continued)**

8. Click the **edit icon** to change any information in the Compensation form.

9. Click **Next**.
**Process Steps (continued)**

10. Click the **edit icon** to change any information in the One-Time Payment form

11. Click **Next**

12. Review the Summary Page; when ready, click **Submit**

**REASONS**
- Incidental Expenses
- One-Time Payment
- Relocation Expenses

**NOTE:** If Workday doesn’t allow you to enter an amount, you may need to return to the Compensation page and reselect TH Hourly Plan as the hourly compensation plan name.
Process Steps (continued)

13. Click **Complete Questionnaire**

14. Complete the Questionnaire  
*(do NOT select “None of the Above” for any question)*

HINT: If you click **Done** instead of **Complete Questionnaire**, you can access the task from your Workday Inbox.

15. Click **Submit**
Process Steps (continued)

16. Click Generate Document

17. Click the double arrows to enlarge the screen; then review the offer letter and edit as appropriate *(do NOT select “None of the Above” for any question)*

18. Type comments and click Submit

19. Process moves to candidate to accept; click Done
**Process Steps**

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

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

   ![Workday screenshot showing Inbox]

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

   ![Workday screenshot showing offer task]

**Jamie Baker**

- For: 00002318 SJRMC_OB Tech_C0548
- 29 second(s) ago
- Jobs Applied to: 1
- Action Required: Offer
- Source: Referral -> Employee Referral (Janet Nelson)

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Process Steps (continued)

4. Click **Background Check** from the Move Forward menu

5. Process moves to Recruiting Coordinator; click **Done**

Click the prompt icon to choose the appropriate screening.
**Process Steps**

1. Log in to Workday
2. Click **Inbox**
3. Find the Offer task and click to open *(opens in the right pane of the screen)*

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

**NOTE:** If you are ready to start the Hire process before an Inbox notification is received, type **hire employee** in the search bar to start the process.
Process Steps (continued)

4. Click Hire from the Move Forward menu

5. Process continues; for support on the Hire process, see the Hire and Onboarding job aid beginning on page 70
Workday Job Aid

Talent Acquisition: Requisition to Hire

**Description**

This process is used once a candidate is chosen and has accepted the position (new hire/rehire). It enters the candidate into the Workday system as a new hire/rehire.

**When to Use**

Use this process to add a new/returning colleague to Trinity Health in the Workday system in either:

- **New Position:** Fills a vacancy for a new position. An open position must be available before this process may be done.
- **Existing Position:** Fills a vacancy for an existing position.

**HIRE vs. CHANGE JOB:**

- If you “hire” an internal candidate at an RHM that is NOT using Workday: Use the Hire job aid.
- If you “hire” an internal candidate at a Workday location (to an open position with a job requisition): After the colleague has accepted the offer letter, start from the “Ready for Hire” steps in the Hire job aid. Once those are complete, Workday will move you to this Change Job process.

**Related Reports**

- View Open Positions
- Critical Open Positions

Updated as of June 16, 2017
**Before You Start**

Ensure local policies and procedures have been followed and appropriate approvals have been received before adding a new hire. This may include:

- Manager works with Primary Recruiter in the interview and selection process
- Manager and Primary Recruiter determine salary offer in accordance with compensation guidelines
- Primary Recruiter extends the offer and receives acceptance from the candidate

**Description**

This section is used once a candidate is chosen and has accepted the position (new hire/rehire). It enters the candidate into the Workday system as a new hire/rehire.

**Notes**

**HIRE vs. CHANGE JOB:**

- If you “hire” an internal candidate at an RHM that is NOT using Workday: Use this Hire and Onboarding job aid.
- If you “hire” an internal candidate at a Workday location (to an open position with a job requisition): After the colleague has accepted the offer letter, start from the “Ready for Hire” steps in this Hire and Onboarding job aid (see page 72). Once those are complete, Workday will move you to this Change Job process.

**Related Reports**

- View Open Positions
- Critical Open Positions

**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.
**Business Process Steps and Roles**

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

**NOTE:** Steps done outside of HR/TA are shaded in gray, and instructions for these steps are NOT included in this job aid.

**Ready for Hire:**
- **Initiate Hire:** Primary Recruiter
- **Verify Licenses and Certifications:** Primary Recruiter
- **Review Documents:** Candidate
- **Revise Employee Hire:** Primary Recruiter

**Hire:**

<table>
<thead>
<tr>
<th>Step</th>
<th>Process Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Organization Assignments</td>
<td>Primary Recruiter</td>
</tr>
<tr>
<td>Assign Pay Group</td>
<td>Payroll Partner/Lite</td>
</tr>
<tr>
<td>Assign Collective Agreement</td>
<td>Primary Recruiter</td>
</tr>
<tr>
<td>Propose Compensation</td>
<td>Primary Recruiter</td>
</tr>
<tr>
<td>Request One-Time Payment</td>
<td>Primary Recruiter</td>
</tr>
<tr>
<td>Maintain Employee Contract</td>
<td>Onboarding Representative</td>
</tr>
<tr>
<td>Pension Exclusion</td>
<td>Primary Recruiter</td>
</tr>
<tr>
<td>Add Probation Period</td>
<td>Onboarding Representative</td>
</tr>
<tr>
<td>Change Personal Information</td>
<td>Onboarding Representative</td>
</tr>
</tbody>
</table>

**NOTE:** Once the Change Organization Assignments step is complete, the new hire will have an employee ID number.

**Step**
- Verify Government IDs: Onboarding Representative
- Update Lic/Cert/Education: License Certification Partner
- Edit Service Dates: Onboarding Representative
- Change Contact Information: Onboarding Representative
- Enter Payroll Reporting Codes: Onboarding Representative
- Local Employee Documentation: Onboarding Representative
- Colleague Onboarding: Employee as Self
- Initiate Employee Health Information: Primary Recruiter

**NOTE:** Primary Recruiter below could also be the HRIS Person who initiated the Hire.
Data Needed for Hire

The following data will be required *(shown by step)*:

**Initiate Hire**
- **Reason:** Menu options available

**Add New Hire Information**

- **Assign Collective Agreement** *(if applicable)*
  - **Collective Agreement:** Union agreement *(choose from menu options)*

- **Maintain Employee Contract** *(if applicable)*
  - **Contract Start Date:** Date new hire will be active on employee contract *(hire date is most common)*
  - **Contract Type:** Choose from menu options
  - **Status:** Closed, open, or pending

- **Add Probation Period** *(if applicable)*
  - **End Date:** Date probation period ends

- **Edit Service Dates** *(if applicable)*
  - **Original Hire Date** *(if rehire)*

- **Payroll Reporting Code** *(if applicable)*
  - **Payroll Reporting Code(s):** Code(s) based on the new hire’s physical work location

- **Pension Exclusion** *(if applicable)*
  - **Reason:** Vow of Poverty or Sisters of Providence Surgeon – Contract Physician
Process Steps

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

1. Log in to Workday
2. Click Inbox
3. Find the Offer task and click to open (opens in the right pane of the screen)

NOTE: Process shown here begins after Offer Letter has been accepted by the candidate.
**Process Steps (continued)**

4. Click **Hire** from the Move Forward menu

5. Process continues; click **To Do**
Process Steps (continued)

1. Read Instructions and act; type comments

   ![Image of a form for verifying licenses and certifications]

   **NOTE:** The background check will confirm the licenses and certifications. You confirm this step is complete here.

2. Click Submit
Process Steps (continued)

1. Process moves to Disposition Candidates

You have marked as Complete
Ready for Hire for Job Application: Roland Gunslinger - 00017096 Security Officer

Up Next
Batch/Job: Decline Remaining Jobs

2. Click on your inbox and Complete the To Do once that is complete you are ready to process the Hire

Complete To Do
Disposition Remaining Candidates

For: Roland Gunslinger - 00017096 Security Officer
Overall Process: Job Application: Roland Gunslinger - 00017096 Security Officer on 06/07/2017
Overall Status: In Progress
Instructions: Please ensure that all remaining candidates have been properly dispositioned before completing this business process.

ToDisposition additional candidates, go to Recruit tab, select the individual candidate or click the “Mass Action” option.
Go to Candidates tab, select the individual you want to disposition or the box to select “All”, then select “Decline” and the use the dropdown to select the reason. Then select “OK”

You have marked as Complete
Ready for Hire for Job Application: Roland Gunslinger - 00017096 Security Officer
1 minute(s) ago

Process Successfully Completed
Process Steps

1. Log in to Workday

2. Click **Inbox**

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

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

**NOTE:** Hire email arrives after candidate completes document requests.
Process Steps (continued)

1. Complete the Revise Employee Hire form (* indicates required information)

**WHAT IS THIS?**
- **Job Profile**: Auto-populates based on position chosen to be filled
- **Time Type**: Auto-populates based on position chosen to be filled
- **Location**: Auto-populates based on position chosen to be filled
- **Employee Type**: Auto-populates based on position chosen to be filled
- **Pay Rate Type**: Choose Hourly for all colleagues

**Hire Employee:**
- Acquisition/Merger
- Hired from Non Workday Affiliate
- New Hire
- Resident
  - Residents – Day 1 Benefits
  - Residents – Oakland
  - Residents – Wilmington
  - Residents – Ann Arbor
  - Residents – Grand Rapids
  - Residents - Livonia

**Rehire Employee:**
- Rehired from Non Workday Affiliate after less than 1 Year
- Rehired from Non Workday Affiliate after more than 1 Year
- Rehire Greater Than 1 Year
- Rehire Less Than 1 Year

**SCREEN INSTRUCTIONS**
CONTINUE ON NEXT PAGE

**SCREEN INSTRUCTIONS**
CONTINUE ON NEXT PAGE
Process Steps (continued)

2. Review Additional Information and make changes

**WHAT IS THIS?**
- **Job Title/Business Title**: Auto-populates based on position chosen to be filled
- **Weekly Hours**: Only change Scheduled Weekly Hours, if necessary (or FTE will calculate incorrectly)
- **Workers’ Compensation Code Override**: NOT USED AT THIS TIME
- **Work Shift**: The shift to be worked by the colleague; choose from menu options

**PROCEDURAL REQUIREMENT:**
(diffs from Workday system requirements)
- Scheduled Weekly Hours
- Job Classification
- Work Shift

**Click the prompt icons for options**

**SCREEN INSTRUCTIONS CONTINUE ON NEXT PAGE**

**To learn more about Job Classification and Work Shift options, go to the Workday Help website at workday.trinity-health.org.**
Process Steps (continued)

3. Review Additional Information and make changes *(continued)*

4. Click the **add icon** and **Attach** to add attachments *(if applicable)*

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

6. Process continues; click **Open**

**First Day of Work**
Auto-populates to match Hire Date

**Time of Hire**
DO NOT USE

**Continuous Service Date**
Auto-populates to match Hire Date; if rehire, add original Hire Date to bridge the continuity of service

**Benefits Service Date**
Tracks length of service for benefit programs; use Hire Date or Continuous Service Date (whichever is earlier)

**Company Service Date**
Tracks an additional service date, such as date of acquisition; use Hire Date or Continuous Service Date (whichever is earlier)

**WHAT IS THIS?**

- **First Day of Work**
- **Time of Hire**
- **Continuous Service Date**
- **Benefits Service Date**
- **Company Service Date**

**HINT:** If you click **Done** instead of **Open**, you can access the next task from your Inbox.
### Process Steps (continued)

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

1. Scroll down, review the Organizations form; click the *edit icon* to make updates

<table>
<thead>
<tr>
<th>Organizations</th>
<th>Company Name of Health Ministry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company</td>
<td></td>
</tr>
<tr>
<td>Company</td>
<td>ML_SMHC Saint Mary's Health Care</td>
</tr>
<tr>
<td>Cost Center</td>
<td></td>
</tr>
<tr>
<td>Cost Center</td>
<td>IN302, 85002 St Mary Mercy Hospital Livonia</td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
<tr>
<td>Religious Order</td>
<td></td>
</tr>
<tr>
<td>HR Company</td>
<td></td>
</tr>
<tr>
<td>9100 System Office - Newtown Square</td>
<td></td>
</tr>
<tr>
<td>Financial Organization</td>
<td></td>
</tr>
<tr>
<td>IN302 Trinity Health System Office - Other</td>
<td></td>
</tr>
<tr>
<td>Absence Group Exceptions</td>
<td></td>
</tr>
<tr>
<td>Pay Rule</td>
<td></td>
</tr>
<tr>
<td>0010</td>
<td></td>
</tr>
</tbody>
</table>

**NOTE:** This acts as a confirmation step.

**Click the prompt icon for options**

**Click the checkmark icon to accept change**

**PROCEDURAL REQUIREMENT:**
(differs from Workday system requirements)
- Company, Cost Center HR Company, and Financial Organization are required

**To find information on the companies and cost centers, contact the RHM Accounting/Payroll Dept.**

**Company**
Name of Health Ministry

**Cost Center**
The 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)*

**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

**Financial Organization**
Business Unit or Process Level; ties to Health Ministry
Process Steps (continued)

2. Type comments and click Submit

3. Process continues; click Open
   (or click Skip if no collective agreement)

   NOTE: Once this step is complete, the new hire now has an employee ID number.
Process Steps (continued)

1. The next set of 14 tasks runs at the same time as Onboarding is completing their tasks.
   
   A. New hire completes onboarding, including:
      
      i. Review Documents (including RHM-specific documents, if applicable)
      ii. Complete Form I-9
      iii. Manage Personal Information
      iv. Change Emergency Contacts
      v. Disability Self-Identification
      vi. Veteran Status Identification
      vii. Add Payment Elections
      viii. Benefits Review Documents

2. The 14 tasks will be in the inboxes of the Primary Recruiter, License Certification Partner and Onboarding Representative at that same time to complete all at once. Then after those, and the Onboarding tasks by the colleague are completed, the Change Personal Information and Change Contact Information tasks will trigger for the Onboarding Rep to verify them.

NEXT STEPS: New Hire reviews/completes...

- Documents required by Trinity and the Ministry
- Section 1 of Form I-9
- Code of Conduct and Conflict of Interest documents
- Tax elections
- Personal information
- Emergency contact information
- Pay elections
- Disability self-identification
- Veteran status identification
- Benefits documentation
Tasks that trigger simultaneously

**Colleague Inbox**
- Complete Form I-9
- Change Contact Information
- Veteran Status Identification
- Disability Self-Identification
- Change Emergency Contacts
- Review Documents
- Review Documents
- Review Documents

**Onboarding Rep Inbox**
- Manage Probation Period: Roland Gunslinger (4208334)
- Service Dates Change: Roland Gunslinger (4208334)
- Pension Exclusion - If an Exclusion does not apply, click Skip to continue to next step.: 175403 SACA_Security Officer_F1700 - Roland Gunslinger (4208334)
- Initiate Employee Health Information: Hire: Roland Gunslinger (4208334)
- One-Time Payment: Roland Gunslinger
- Propose Compensation Hire: Roland Gunslinger (4208334) - 175403 SACA_Security Officer_F1700
- Update Licenses, Certifications and Education for Worker: Hire: Roland Gunslinger (4208334)
- Contract: Roland Gunslinger (4208334)
**Note:**

This is where the License and Certification Partner actually enters in the information for the Workers into Workday.
Process Steps (continued)

Which role(s) can do this step?
- Onboarding Representative

1. Once you have started the hire you will want to make sure that the Government ID has populated in Workday from the Candidate entry.

2. Click on the Edit Government IDs For Worker. This will open the actual task for you to pick the Worker and review their information. Type in their name or number and click ok.

NOTE: Verifying duplicate ID is VERY important. If you do not and there is another worker (or the same worker) in Workday this will cause payroll issues.
3. If the information is there, click Cancel, go back to your inbox and complete the task.
Process Steps (continued)

4. If the information is not there, click on the + sign under National IDs and type the information. Click Submit when you are done.
Process Steps (continued)

Which role(s) can do this step?
• Primary Recruiter

1. Click the prompt icon to choose from the Collective Agreements (* indicates required information)

2. Type comments and click Submit

3. Process continues; click Open

To skip this step if not applicable:

1. From the email, click the gear icon
2. Click Skip This Task

Note: You will be required to type a skip reason.

To learn more about Collective Agreements and who is eligible, go to the Workday Help website at workday.trinity-health.org.

Based on your choice, you may also be asked to choose an Area; click the prompt icon for options.
Process Steps (continued)

1. Review the auto-populated information at the top of the form

**IMPORTANT:** These fields cannot be updated from this screen.

- **Effective Date & Reason**
  - Shows effective date entered during Initiate step

- **Primary Compensation Basis**
  - Auto-populates based on information provided in this process; not an editable field

- **Guidelines**
  - Compensation guidance/information based on Job Profile chosen during Initiate step

SCREEN INSTRUCTIONS CONTINUE ON NEXT PAGE
Process Steps (continued)

2. Click the **edit icon** to update the compensation amount, if needed

**WHAT IS THIS?**

**Total Base Pay**
- Range guideline of base pay auto-populated based on Job Profile

**Amount**
- Hourly pay amount within the Total Base Pay range

**Currency**
- **DO NOT CHANGE** from USD

**Frequency**
- Frequency of payroll; auto-populated based on Job Profile – Hourly should be the only one used anything else will be incorrect when it comes time to pay the employee.

**IMPORTANT:** Use Hourly for all colleagues

**Salary**
- **DO NOT USE**

**Hourly**
- Use for all colleagues

**Allowance**
- Auto-populates based on position; **DO NOT MODIFY**

**Click the checkmark icon to accept changes**

**NOTE:** You will receive a warning message if you type an amount above or below the Total Base Pay range. This warning will not stop you from proceeding.
Process Steps (continued)

3. Type comments and click Submit

4. Process continues; click Open or To Do based on what process appears next.
   (or click Skip if not applicable)
Process Steps (continued)

Which role(s) can do this step?
• Primary Recruiter

1. Review the Request One-Time Payment (OTP) form; click the edit icon to make changes (* indicates required information)

Request One-Time Payment Jamie Jones (4199755) 130 SO_Assistant buyer_1730

One-Time Payment Summary

Summary

Effective Date ★
11/30/2016

Reason
One-Time Payment > One-Time Payment

Total Amount Requested
$500.00 USD

One-Time Payment

Payment Details
$500.00 USD

One-Time Payment Plan
Bonus - Signing

NOTE: This acts as a confirmation step.
Process Steps (continued)

2. Type **comments** and click **Submit**

3. Process continues; click **Open**
   *(or click **Skip** if no employee contract)*
Process Steps (continued)

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

   Which role(s) can do this step?
   • Primary Recruiter

   **WHAT IS THIS?**
   - Contract ID
     Based on Health Ministry guidelines
   - Contract Start Date
     Date contract will begin
   - Contract Type
     Choose from menu options
   - Status
     Choose closed, open, or pending
   - Date Employee Signed
     Date colleague signed the contract
   - Date Employer Signed
     Date employer representative signed the contract
   - Contract Description
     Based on Health Ministry guidelines
   - Contract Attachments
     Click Create Worker Document from menu options to go to an attachment screen

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

   **SCREEN INSTRUCTIONS CONTINUE ON NEXT PAGE**

   **Click the prompt icons for options**
2. Type comments and click Submit

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

1. Click the **prompt icon** to choose an exclusion reason.

   ![Pension Exclusion dialog box]

   **Pension Exclusion** - If an Exclusion does not apply, click Skip to continue to next step. Hire: Karla Colleague (5100028).

   - Exclude From Pension Reason
     - Exclude From Pension Reason
     - Search
     - Religous - Vic of Poverty
     - Sisters of Providence Preme - Contract Physician
     - Do Not Exclude

   - **Submit**
   - **Cancel**

2. Type **comments** and click **Submit**.

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

   ![Success! Event submitted Contract: Jamie Jones (4199755)]

   **Success! Event submitted** Contract: Jamie Jones (4199755).

   - **Up Next**
     - Onboarding Representative
     - Manage Probation Period: Jamie Jones (4199755) - Manage Probation Period
     - Due Date: 12/01/2016
   - **Add Contract**
   - **Do Another**
   - **Done**

HINT: Click **Add Contract** on the event submitted screen to add more than one contract for a colleague.

To skip this step if not applicable:

1. From the email, click the **gear icon**.

2. Click **Skip This Task**.

   **Note:** You will be required to type a skip reason.

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Process Steps (continued)

1. Log in to Workday

2. Click **Inbox**

3. Find the Manage Probation task and click to open
   (opens in the right pane of the screen)
Process Steps (continued)

4. Update the Add Probation Period form (*indicates required information)

   ```
   Start Date
   End Date
   Type
   Reason
   Extended End Date
   Note
   ```

   Click the prompt icon for options

   **NOTE:** Probation Period drives the Introductory Evaluation in Workday. If the colleague does not need one, you can skip the task.

5. Type comments and click Submit

6. Process continues; click Open

   **HINT:** End Date will be required.

   **WHAT IS THIS?**

   - **Start Date**: Auto-populates to date of hire
   - **End Date**: End date of probation period; varies by RHM (e.g., 12 weeks for non-managers and 6 months for managers)
   - **Type**: Choose 30, 60, 90, 120, or 180 days from menu
   - **Reason**: Auto-populates with Introductory
   - **Extended End Date**: Could be used as a backup end date in case the hire/start date changes
**Process Steps (continued)**

1. Add service dates, as applicable

   - **Original Hire Date**: Same as hire date unless a rehire, then date of first hire
   - **Continuous Service Date**: Date that will be used to bridge the continuity in service; defines length of service
   - **Benefits Service Date**: Tracks length of service for benefit programs
   - **Company Service Date**: Tracks an additional service date, such as date of acquisition
   - **Time Off Service Date**: Tracks time-off eligibility based on a different service date
   - **Seniority Date**: Auto-populates with Hire Date; tracks seniority based on a date other than Hire Date or Company Service Date
   - **Retirement Eligibility Date**: Tracks eligibility for retirement, such as when it is based on length of service or age
   - **Expected Retirement Date**: Reports on retirement for workers who announce their retirement date in advance
   - **Severance Date**: Tracks how long a worker receives severance pay
   - **Vesting Date**: Tracks when a worker is fully vested, when this differs from standard vesting rules

2. Type **comments** and click **Submit**

3. Process continues; click **To Do** (or click **Skip**)

To learn more about these dates and their implications, go to the Workday Help website at [workday.trinity-health.org](http://workday.trinity-health.org).
Process Steps (continued)

1. Click **Maintain Payroll Reporting Codes for Worker**

   ![Screen Shot](image1)

   This step will only appear if the colleague’s address is in Iowa, Massachusetts, or Michigan.

2. Complete the form

   ![Screen Shot](image2)

   **Effective Date**
   - Enter the date of hire (first day of work)

   **Worker**
   - Name of new hire

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

4. Click the **prompt icon** to select the payroll reporting code for the new hire’s physical work location

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

6. Click **Done** to return to your Workday inbox

**HINT:** Click the **add icon** to add more payroll reporting codes.

To learn more about the payroll reporting codes and which you should use, go to the Workday Help website at [workday.trinity-health.org](http://workday.trinity-health.org).
Process Steps (continued)

7. From the inbox message, click **Submit**

8. Process moves on; click **Done**
1. Log in to Workday

2. Click **Inbox**

3. Find the Local Employee Documentation task and click to open (opens in the right pane of the screen)
4. Read Instructions and act

5. Type comments and click Submit

6. Process moves to next step; click Done

**NOTE:** This acts as a reminder to actively gather locally required documentation, if needed.

To learn more about additional documentation for local government, go to the Workday Help website at [workday.trinity-health.org](http://workday.trinity-health.org).
1. Log in to Workday
2. Click Inbox
3. Find the Initiate Employee Health Information task and click to open (opens in the right pane of the screen)
**Process Steps (continued)**

4. Read Instructions and act

5. Type if the screen is complete or in process in the comments; click **Submit**

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

**NOTE:** This acts as a notice to initiate the employee health screen.
Process Steps (continued)

Which role(s) can do this step?
- Onboarding Representative

1. This step will trigger after the colleague has completed their onboarding tasks and you have completed all other tasks as well. Read the Instructions and act.

   - Instructions: Please enter in your complete mailing address including city, state, and zip code along with selecting a usage (such as Mailing and/or Street Address).

2. Click on Change Contact Information, this will open the actual task for you to pick the Worker and review their information. Type in their name or number and click ok.
Process Steps (continued)

Which role(s) can do this step?
• Onboarding Representative

2. Verify the address is correct and contains Street Address, City, State, and Zip Code. If all are present you can go back to your inbox and submit the task. If anything needs to be corrected Click on Edit to correct.

3. Use the Pencil to correct missing or invalid information.

4. Click submit when done.

5. Go back to your inbox and submit the Change Personal Information Task.

NOTE: Address must contain all information for PCE and Payroll; Street Address, City, State and Zip.
Process Steps (continued)

Which role(s) can do this step?
- Onboarding Representative

1. Review Personal Information on the new colleague.
2. Click on the pencil to update anything that is missing or incorrect.
3. Click Submit

NOTE: There is a comments box that you can add to if needed before submitting the task.
End of Process: Next Steps

WHEN HIRE PROCESS IS COMPLETE

- For locations with CBAs, union steward should be notified of a hire.
- **INTEGRATION:** Identity Management automatically detects changes and updates the identity vault for identification, email account, etc.
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/Recruiter needs to fill a position
- Manager identifies a need/opportunity for a job change and works with Recruiter, HR Partner, or HR Representative
  - Manager discusses change with colleague
  - Receiving manager approves change
- HR/Talent Acquisition completes any other necessary steps (e.g., create position, create job requisition, generate offer letter)
- Colleague accepts role/change and completes offer letter (if applicable)

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.

Description

This section shows how to make a change to a colleague’s job based on one of the reasons listed below.

Notes

- For changes to Organization only, use the Change Organization job aid (see page 8 for items included in Organization)
- For changes to Compensation only, use the Request Compensation Change job aid

Related Reports

- Critical Open Positions
- Trending Time to Fill Critical Positions

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.

HINT: If a screen has a gear icon, click to see additional options for that screen.
Business Process Steps and Roles

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

NOTE:
- Steps will vary based on the change being made. All steps may not be required.
- Steps done outside of HR/TA are shaded in gray, and instructions for these steps are NOT included in this job aid.

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

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Process Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Change Job</td>
<td>HR Partner or Recruiter</td>
</tr>
<tr>
<td>Review Organization Assignment</td>
<td>HR Partner, HR Representative, or Initiator</td>
</tr>
<tr>
<td>Assign Collective Agreement</td>
<td>HR Partner, HR Representative, or Initiator</td>
</tr>
<tr>
<td>Maintain Employee Contract</td>
<td>HR Partner, HR Representative, or Initiator</td>
</tr>
<tr>
<td>Review Compensation Change</td>
<td>Manager’s Manager</td>
</tr>
<tr>
<td>Request One-Time Payment</td>
<td>HR Partner, HR Representative, or Initiator</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>
</tbody>
</table>

CONTINUES IN NEXT COLUMN

SPECIAL NOTE:
Generally, if a change involves a job requisition/posting, a Recruiter should initiate.

- **If you “hire” an internal candidate at a Workday location** (to an open position with a job requisition): After the colleague has accepted the offer letter, start from the “Ready for Hire” steps in the Hire and Onboarding job aid (see page 72). Once those are complete, Workday will move you to this Change Job process.
- **If you “hire” an internal candidate at an RHM that is NOT using Workday:** Use the Hire and Onboarding job aid (page 70).
**TA: Change Job**

**Process Steps**

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

If you “hire” an internal candidate at a Workday location (to an open position with a job requisition):
After the colleague has accepted the offer letter, start from the “Ready for Hire” steps in the Hire and Onboarding job aid (page 72). Once those are complete, Workday will move you to #7 of this Initiate Change Job step, and you will move forward from there.
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

**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. 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

**NOTE:** Changes default to start of the next pay period. To start at another date, enter date above and uncheck this box under Details.

8. Click Start

**WHAT IS THIS?**

- 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
  - Per Diem to Part-time

**Others**

- Change Location
- Interim Assignment
- Interim Assignment End – No Longer Acting
- Job Reclassification
- Move to Another Manager (Reporting Relationship Change)
- Move to Another Manager in Another Company
- Move to Another Position on My Team
- Move from Employee to Non-Employee
- Transfer from RHM to RHM

**NOTE:** Some items may auto-populate based on the job requisition, if applicable.
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.
Process Steps (continued)

ABOUT THE JOB CHANGE SCREENS

<table>
<thead>
<tr>
<th>Description</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>(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, 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>
<td>Edit hourly compensation and allowances</td>
</tr>
</tbody>
</table>

Special Notes

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

Choose the new position from this screen or click a box to create a new position

If the base pay change is 5% or more, the HR Leader will need to approve

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

NOTE: For changes to Organizations only, please use the Change Organization process.

NOTE: For changes to Compensation only, please use the Request Compensation Change process.

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

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TA: Change Job
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
• Recruiter

1. Log in to Workday
2. Click Inbox

3. Find the change task 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.

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

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)

1. Log in to Workday
2. Click Inbox
3. Find the Assign Organization task 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)

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

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

NOTE: Assign Collective Agreement can be skipped if it does not apply. You will be asked to provide a comment.

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)

1. Click the prompt icon to choose from the Collective Agreements (* indicates required information)

2. Type comments and click Submit

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

Based on your choice, you may also be asked to choose an Area; click the prompt icon for options

NOTE:
Maintain Employee Contract can be skipped if it does not apply. You will be asked to provide a comment.

To learn more about Collective Agreements and who is eligible, go to the Workday Help website at workday.trinity-health.org.
Process Steps (continued)

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

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

   **NOTE:**
   You can skip this step by clicking on the Gear and choosing Skip Step.

   **WHAT IS THIS?**
   - 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
   - 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

   Screen Instructions
   Continue on next page

   **Click the prompt icons for options**

   **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
**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)
Process Steps (continued)

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

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

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

**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.
**Process Steps (continued)**

4. Review the Compensation Change form

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

6. Process moves to next step; click **Done**
1. Log in to Workday

2. Click **Inbox**

3. Find the One Time Payment task and click to open (opens in the right pane of the screen)

Which role(s) can do this step?

- HR Partner
- HR Representative
- Initiator

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

4. Click **Add**

5. Click the **prompt icon** to choose a One-Time Payment Plan and enter the **amount**

6. Type additional information and click **Submit**

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

1. Log in to Workday
2. Click Inbox
3. Find the PTO Accrual task and click to open (opens in the right pane of the screen)

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

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

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

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

**NOTE:**
Offboarding Procedure can be skipped if it does not apply. You will be asked to provide a comment.
Process Steps (continued)

1. Read Instructions and act; type comments

   Complete To Do: Offboarding Procedure

   Instructions:
   - To remove network access, complete the System Access Request form (SAR) and/or Service Now request
   - Submit final expense report
   - Turn in corporate credit card (purchase card)
   - Turn in badge and security pass (Identification Badge, I.D. Identification Badge)
   - Turn in keys (suite, desk, file cabinets)
   - Turn in equipment (computers, laptop, iPad, Tablet and related accessories)
   - Turn in home computers and turn off home connections (e.g. cable, router, device, FOB)
   - Turn in communication equipment (cell phone, pager, and any other wireless accessories or data devices)
   - Turn in automobile

   enter your comment

   Submit  Save for Later  Close

2. Type comments and click Submit

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

   Up Next:
   - HR Shared Services Representative 2
   - To Do: Benefits coordination
   - Due Date: 12/23/2016

   Done and Process

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

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

1. Log in to Workday
2. Click **Inbox**
3. Find the Benefits Coordination task and click to open (opens in the right pane of the screen)

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

NOTE: Steps will vary based on the change being made. This step may not be required.
4. Type comments and click Submit

NOTE: This gives the opportunity to review the change and initiate a benefit event for the colleague if it is applicable.

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

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

   ![Workday Inbox](image)

3. Find the Assign Probation Period task and click to open
   (opens in the right pane of the screen)

4. Scroll down and click **Add Probation Period**

   ![Add Probation Period](image)

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

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

5. Type **name of Worker (colleague)** and click **OK**

6. Complete the Probation Period form and click **Submit**

7. Click **Done**
Process Steps (continued)

8. Return to the Inbox message and click Submit

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

NOTE: Verify Licenses and Certifications can be skipped if it does not apply. You will be asked to provide a comment.
Process Steps (continued)

1. Log in to Workday
2. Click Inbox
3. Find the Verify Licenses task and click to open (opens in the right pane of the screen)

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

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 acts as a notice to verify the colleague has valid licenses and certifications required to perform the job.
Process Steps (continued)

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

1. Log in to Workday

2. Click Inbox

3. Find the PTO/Sick task 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)
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/HRSS Representative
- Onboarding Representative

This step will only appear if the colleague’s address is in Iowa, Massachusetts, or Michigan.
Process Steps (continued)

4. Click **Maintain Payroll Reporting Codes for Worker**

5. Type Effective Date and search for the Worker (colleague)

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

7. Click the prompt icon to find the proper payroll reporting code

8. Click Submit

9. Click Done

10. Return to the Inbox message and click Submit

11. The next step is dependent on the change; click Done, Open, To Do, or Skip (as appropriate)
TA: Change Job

Process Steps (continued)

Which role can do this step?
- Departing Manager
- Onboarding Representative

1. Log in to Workday

2. Click Inbox

3. Find the change task 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).

**NEXT STEP:** Colleague updates tax elections and benefits, if applicable.
TA: Change Job

**Process Steps (continued)**

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

1. Log in to Workday

2. Click **Inbox**

3. Find the Benefit Change task 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 Benefit Event Type

SCREEN INSTRUCTIONS
CONTINUE ON NEXT PAGE
Process Steps (continued)

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

   ![Approve comment interface]

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

   ![Next process interface]
Process Steps (continued)

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

1. Log in to Workday
2. Click Inbox
3. Find the Onboarding task 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

![Complete To Do Other Onboarding Procedures](image)

- Request network access
- Request phone
- Request computer
- Order name plates
- Order business cards

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 opportunity to confirm all onboarding procedures for the colleague.

NEXT STEP: Security Partner updates user-based security groups, if applicable.
End of Process: Next Steps

WHEN CHANGE JOB PROCESS IS COMPLETE

- If applicable, Sending Manager contacts Recruiter to begin backfill process
## APPENDIX: Change Job

### Job Requisition Reasons

<table>
<thead>
<tr>
<th>Topic</th>
<th>Scenarios</th>
<th>Job Posting Guidelines</th>
<th>Job Change Reason that can be used</th>
<th>Who Initiates</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Reclassifications</strong></td>
<td></td>
<td><strong>Other Similarly Situated Individuals within Dept</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Backfill</td>
<td>Grade Change</td>
<td>No No No No Posting Required</td>
<td>Job Reclassification</td>
<td>Manager</td>
</tr>
<tr>
<td>No</td>
<td>Yes (Increase)</td>
<td>No No Posting Required</td>
<td>Job Reclassification</td>
<td>Manager</td>
</tr>
<tr>
<td>No</td>
<td>Yes (Decrease)</td>
<td>No/Yes No Posting Required</td>
<td>Job Reclassification</td>
<td>Manager</td>
</tr>
<tr>
<td>No</td>
<td>Yes</td>
<td>Internal posting at minimum, additional postings (system wide and external) if needed</td>
<td>Depends. Could be promo or transfer or other lateral move scenario</td>
<td>HR/TA</td>
</tr>
<tr>
<td><strong>2. Reorganization</strong></td>
<td></td>
<td>Any new open positions created by reorganization must be posted internally at minimum, additional postings (system wide &amp; external) if needed.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reorganization</td>
<td></td>
<td>If reorganization is simply moving work among existing employees and there are no promotional opportunities, posting not required.</td>
<td>Depends--Could be promo or transfer or other lateral move scenario</td>
<td>Manager or HR/TA</td>
</tr>
<tr>
<td><strong>3. Career Ladders - Promotion Plans</strong></td>
<td></td>
<td>No Posting Required (All career ladders must be approved in advance by Human Resources).</td>
<td>Promo - Career Ladder (Career Progression)</td>
<td>Manager</td>
</tr>
<tr>
<td><strong>4. Contingent Positions</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. Changing a person from regular to contingent status.</td>
<td>No Posting Required</td>
<td>Job Reclassification</td>
<td>Manager</td>
<td></td>
</tr>
<tr>
<td>b. Changing person from contingent to Regular PT/FT</td>
<td>If there is a new position, the position must be posted internally at minimum, additional postings (system wide &amp; external) if needed.</td>
<td>Job Reclassification</td>
<td>Manager</td>
<td></td>
</tr>
<tr>
<td>Topic</td>
<td>Scenarios</td>
<td>Job Posting Guidelines</td>
<td>Job Change Reason that can be used</td>
<td>Who Initiates</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>5. Part-time to Full Time</td>
<td>Changing a person’s status from PT to FT</td>
<td>New open full time positions must be posted internally at minimum, additional postings (system wide &amp; external) if needed. If there are a number of part time individuals in the department who should be considered, posting required. If simply converting an individual from part-time to full time on same position, posting not required.</td>
<td>Job Reclassification</td>
<td>Manager</td>
</tr>
<tr>
<td>6. Shift Changes</td>
<td></td>
<td>If a single incumbent position, no posting required. If there are several people in a shift who should be considered for a move to a different shift then it must be posted internally at a minimum.</td>
<td>Phase 2. Shift not collected in WD in Phase 1. Will launch with TA in Phase 2</td>
<td>n/a</td>
</tr>
<tr>
<td>7. Non-Employee Status (temps, independent contractors etc) Hire Status to Regular Hire Status</td>
<td></td>
<td>The position must be posted n/a - would be a hire</td>
<td></td>
<td>HR/TA</td>
</tr>
<tr>
<td>8. Unsuccessful New Hires</td>
<td>New hire but did not start (no show, failed background check, rescinded offer, etc)</td>
<td>No Posting Required– TA to update disposition in ATS and create/reactivate new requisition.</td>
<td>n/a</td>
<td>HR/TA</td>
</tr>
<tr>
<td></td>
<td>New hire tenure &lt; 90 Days</td>
<td>No Posting Required– TA to update disposition in ATS and create new requisition. Depends on local requirements for posting approval.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>New hire tenure &gt; 90 Days</td>
<td>No Posting Required– TA to update disposition in ATS and create new requisition. Depends on local requirements for posting approval.</td>
<td></td>
<td></td>
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<tr>
<td>9. Passed Boards</td>
<td>Hired into role (ie: GNI) role with understanding that after passing board exams they will be promoted into higher (ie: RN) position</td>
<td>No Posting Required - Use in clinical setting when a clinician passes a board exams that qualifies for higher level role, grade, or payrate.</td>
<td>Promo - Passed Boards</td>
<td>Manager</td>
</tr>
</tbody>
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