Change Job (Transfer, Promote, Demote); Change Location, FTE, Pay Rate Type, Employee Type, and/or Time Type)

CONTENTS

PURPOSE

The Change Job Business Process (B.P.) is used to Transfer, Promote, or Demote a person within an agency or between agencies, Change Location for an employee, Change FTE (Scheduled Weekly Hours), Pay Rate Type, Employee Type, and/or Time Type. Transfers between agencies can be initiated either by the “losing” agency HR Partner or by the “receiving” agency HR Partner. Following is a step-by-step guide on how to do a Change Job action in Workday.

CHANGE JOB CHECKLIST

You will need the following pieces of information to process this action:

- ☐ Employee Name or Employee ID
- ☐ Effective Date
- ☐ Reason for the Job Change event
- ☐ Supervisory Organization (the name of the Sup Org where the vacant position is located)
- ☐ Location of Position
- ☐ Position number and title
- ☐ Employee Type (Regular, Intern, Agency Temp, SOS Temporary, etc.)
- ☐ Job Profile (Job Code)
- ☐ Time Type (full time/part time)
- ☐ Pay Rate Type (Hourly Exempt, Hourly Non-Exempt, Salary Exempt, Salary Non-Exempt)
- ☐ Pay Guidelines/Range for this job from the Pay Plan
- ☐ Cost Center
- ☐ Security Business Unit
- ☐ Pay Group (Bi-Weekly 10-day lag, Monthly 15-day lag, etc.)
- ☐ To Do's (Change benefit elections, Retirement and/or Leave Date Entry, and Review Deductions)

LOG IN TO WORKDAY

1. Log in to Workday from this page, http://link.nebraska.gov/.
   a. **If you have an @nebraska.gov email**, click the first link that says, "Log in with your @nebraska.gov email." On the next screen, type your email address and your email address password.
   b. **If you do NOT have an @nebraska.gov email**, click the second link that says, "Log in with your User Name / Workday password." On the next screen, type your User Name and Workday password.
2. Click Sign In (or press Enter).

WORKDAY RECRUITING – START FROM A REQUISITION | RECRUITER & HR PARTNER

1. Once all Recruiting steps are completed, the Recruiter will start the transfer process by initiating the "ready for Hire" from the candidate profile.

   NOTE: Current employes MUST apply through the Workday Jobs Hub in order for Workday to recognize this as a transfer. Check the candidate profile to ensure the candidate has a designation of (Internal) by their name BEFORE moving to ready for hire.
2. This kicks off the "Staffing Action" step that will show up in the HR Partner's Inbox. Select Change Job in the drop-down menu in the Action field and click submit. This will initiate the "Revise Job Change" for the HR Partner.

   NOTE: "Add Additional Job" should never be selected from the Actions menu.
3. Click submit.

REVISE JOB CHANGE

START

1. Review the details for accuracy. Effective date and reason for making the change can be updated if needed.

a. **When do you want this change to take effect?** – The system defaults the date listed on the offer … if you need a different date, you need to click in the field to change it.

b. **Why are you making this change?** - The system defaults the reason on the offer… if you need a different reason, click in the field to change it.

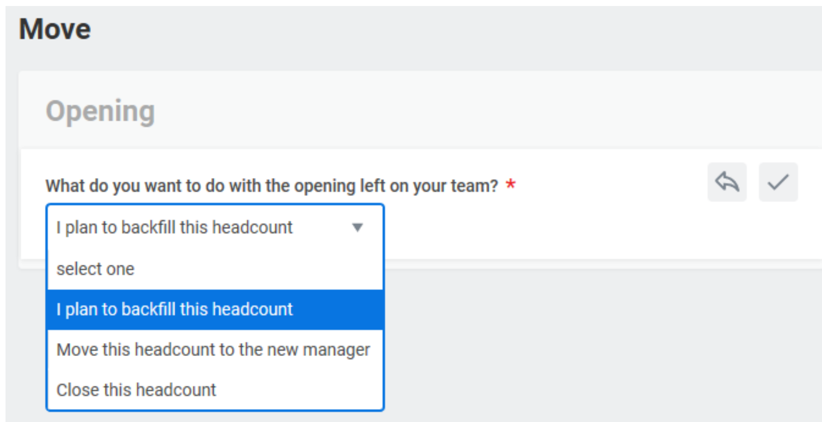
c. **Who will be the manager after this change?** –This will populate from the requisitions.

d. **Which team will this person be on after this change?** – This will populate from the requisition.

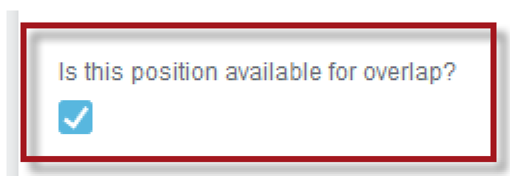
NOTE: Manager means supervisor and team means supervisory organization.

Move

The Move tab is only available if the prior position is within your agency.



2. Indicate what you want to do with the position being vacated. Click the drop-down arrow to see the list of options.
3. IF the effective date for this event is in the future, the overlap feature will be available. If you are going to hire a replacement before the effective date of this event, check the box for "Is this position available for overlap?"



4. Click Submit.

Review: Current Manager

HR Partners in the agency where the transfer is currently working will receive a task in their inbox. The receiving agency should contact the losing agency HR Partner to let them know the transfer request has been submitted; that way the losing agency HR Partner will know to look for the item in their inbox. **Communication between agencies is important.**

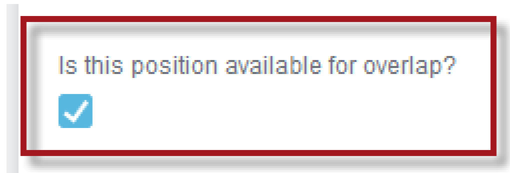
Start

1. Review the details for accuracy. Make edits as appropriate.

Move

2. Indicate what you want to do with the position being vacated. Click the drop-down arrow to see the list of options.

3. IF the effective date for this event is in the future, the overlap feature will be available. If you are going to hire a replacement before the effective date of this event, check the box for "Is this position available for overlap?"



4. Click Approve.

REVIEW: RECEIVING MANAGER

START

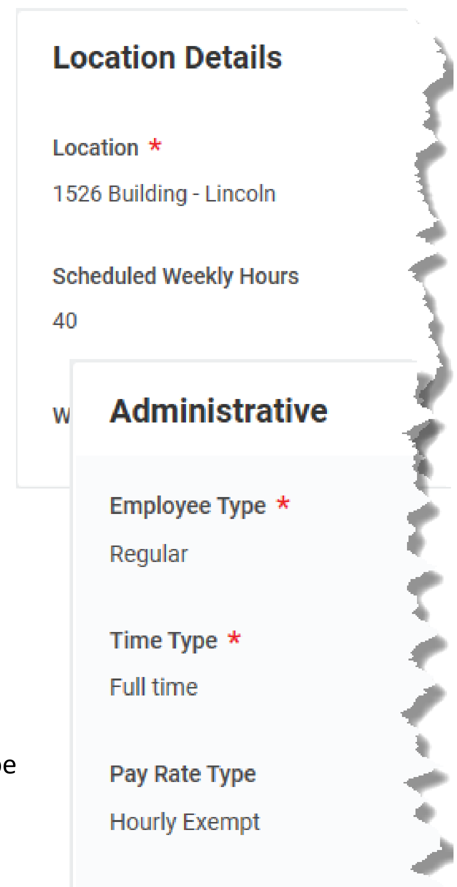
1. Start details will populate from the requisition and offer. Edit as appropriate.

JOB

1. Position details and job profile will populate from the requisition. Review for accuracy.

LOCATION

1. Location Details, scheduled weekly hours and work shift will populate from the requisition. Review for accuracy.



DETAILS

1. Details will populate from the requisition. Review for accuracy.
    a. Employee Type
    b. Time Type
    c. Pay Rate Type – click the prompt if this needs to be changed. Pay Rate Type and Compensation Plan must match to avoid payroll problems. If you change this field from Hourly to Salary, then you must also change the compensation plan to match.
    d. Location Weekly Hours – you cannot change this field.
    e. Default Weekly Hours – **DO NOT** (ever) change this field.
    f. Job Category – defaults based on the job profile; cannot be changed.
    g. Job Classifications – defaults based on the job profile; cannot be changed.
    h. Company Insider Types – we do not use this field; leave blank.
    i. Worker's Compensation Code from Job Profile – we do not use this field; leave blank.
    j. End Employment Date – this relates to temporary employees and is only populated if you entered an end date during the original hire process.

k. First Day of Work –if you change this field. you will get an error message.

l. Notify By – this is not applicable.

Attachments

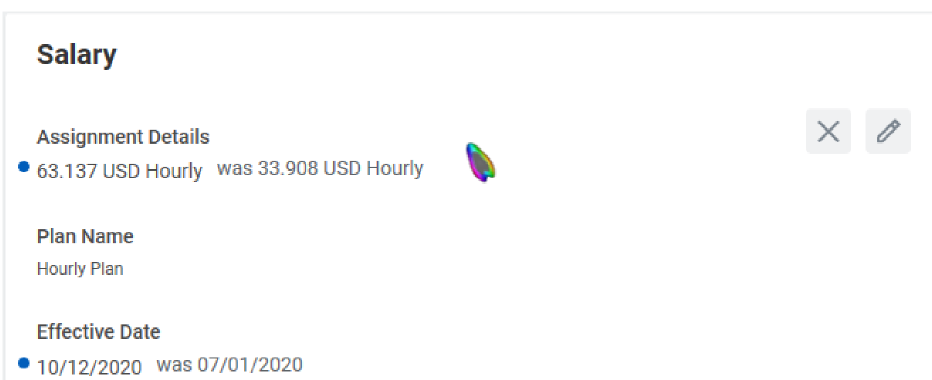
1. If you need to include an attachment, click Add.
    a. On the next screen, click Attach to find and select your document.
    b. Click the prompt in Document Category. This is required so you must select the "best fit" category.
    c. Comment – it's a good idea to add additional detail regarding the document uploaded. However, be mindful of what you type … this is viewable by others and becomes part of the permanent record.

Organizations

1. The organization assignments automatically default first from the requisition, and proposed position restrictions.
2. The following fields need to have information entered, if blank:
    a. Company
    b. Cost Center
    c. Security Business Unit
    d. EDC Group
    e. Budget Program Number
3. If any fields are blank that are supposed to have information, enter that information on this screen. For example, some agencies use the following fields: Position Tracking and Organization Element.

Compensation

1. Compensation details default from the requisition and offer as applicable.
    a. Compensation information is entered ONLY in the Salary section.
    b. If a Salary Plan Assignment does not exist, click Add to add a salary line.
    c. If there is already salary information showing, click Assignment Details to make changes.



    d. Enter the new pay rate in the Amount field. Make sure the frequency matches the amount type entered (hourly for hourly rate or annual for annual rate).
    e. If the Compensation Plan needs to be changed from Hourly to Salary or vice versa, click the X to Remove the current plan and then click Add to enter the new plan information.

2. The Merit, Bonus and Stock sections are not applicable. Do not enter any information in these fields.
3. Once all sections are reviewed, click Approve to advance.

Assign Pay Group

1. Click the Open button for Assign Pay Group. Select the appropriate option for the Proposed Pay Group.
2. Click Submit.

If appropriate for this event and this position, and you are a Classified Agency, the process now goes to State Personnel for approval and then State Budget Office. After State Budget has approved it, you will have other items (To Do's) in your Inbox as reminders to verify and/or check certain information.

Review Deductions

1. Depending on the effective date of transfer/benefit change, you may need to adjust the insurance deductions on the next paycheck.
2. Click To Do and then click Submit to move the process to the next step.

REMINDER: You may have to adjust this person's deductions in E1 because of this transfer event.

Transfer Employee - Benefit Change

1. If the employee is changing from full-time to part time, vice versa, changing pay groups, or increasing or decreasing hours, you **must** complete the Change Benefits action on the employee record to ensure correct benefit elections/premiums are sent to Payroll and Financial Center.
2. Click To Do and then click Submit to move the process to the next step.

REMINDER: You may have to complete a Benefit Change event for this person.

Enter Retirement and Leaves

1. As this is a To Do, you will need to pull up the employee record to complete this. Refer to the Changing Benefit Elections for Employee user guide to set up the employee's retirement and leave accruals.
2. Click To Do and then click Submit to move the process to the next step.

REMINDER: You may have to complete a Benefit Change event for this person to adjust her/his Retirement and/or Leave Accruals.

Onboarding Set-Up

1. This step is assigned to the person's Manager AND to the HR Partner who initiated the hire process. Please invite the person's Manager to complete this step. If not, the HR Partner can complete it, HOWEVER, It MUST be completed for the transfer event to continue processing.
   a. If this step is not completed within two days, the system will automatically push it forward so that the Onboarding piece does get initiated for the new Worker. The "issue" with that is that the "default" information will be used.
2. Review the Message at the top of the page. This message will appear as if it's from the new manager and be available on the transfer's Onboarding Dashboard. Change, if desired.
3. People to Meet
   b. Select the list of People you would like your new teammate to meet.

i. You can search for names by clicking the selection box and typing part or all of the person's name, then press enter.

ii. You can remove any names you do not want to include.

c. Check the box next to Notify if you want an email and Workday notification to go to the Teammate(s) to meet selected above. If no, do not check the box next to Notify.

i. Notify Subject.

ii. Notification Message is what is sent to the people if Notify is checked.

4. Helpful Contacts

a. Select a list of People who can be helpful for your new teammate.

i. You can remove any names you do not want to include.

b. Check the box next to Notify if you want an email and Workday notification to go to the Helpful Contacts selected above. If no, do not check the box next to Notify.

i. Notify Subject.

ii. Notification Message is what is sent to the people if Notify is checked.

5. Click Submit.

The Change Job process is now complete. Onboarding will be kicked-off which only includes surveys that are sent to the transfer and the new supervisor.

LINK HELP DESK CONTACT INFORMATION

The LINK Help Desk assists with the following application – Workday.

Email: as.linkhelp@nebraska.gov

Phone: 402.471.6234