

# Transfer, Promote or Change Job

## Overview

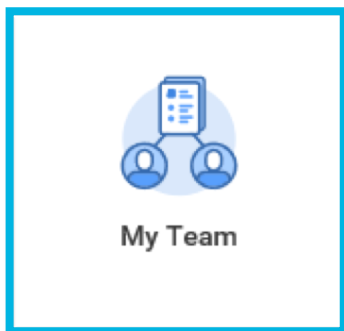
The Change Job business process makes staffing changes easier for managers to:

- Transfer employees or contingent workers.
- Promote employees.
- Demote employees.
- Move workers into lateral positions.
- Move a manager's team.
- Change a worker's location or job details.

## Who Does This: Manager

### Things to Know:

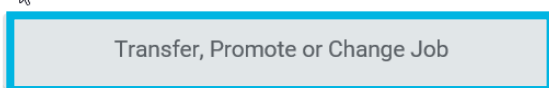
- After you start of the *Change Job* business process, Workday guides you through the data sections to complete. The data sections are based on the change reason you select.
- Approval by your HR Business Partner (HRBP) must be completed to complete this process.
- **NO** new position needs to be created if you are promoting an employee part of career progression, updating their title, or moving/transferring them to a role where their current role isn't being backfilled.



### Step 1

Select the My Team worklet from your home page.

### Actions




### Step 2

Under actions, choose **Transfer, Promote or Change Job**.





### Step 3



Type in the name of your employee or choose his/her name using the list icon. 










### Step 4

Click **OK**.

<p><b>Start</b></p> <p>Start Details</p> <p>When do you want this change to take effect? * </p> <p>11/13/2017</p>	<p><b>Step 5</b> Use the pencil icon to edit the Start Details section.</p> 
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<p><b>Start</b></p> <p>Start Details</p> <p>When do you want this change to take effect? * </p> <p>11 / 06 / 2017</p>	<p><b>Step 6</b> Review the effective date. In the U.S., this date is automatically populated with the next pay period start date.</p> <p>If necessary, use the calendar icon to choose the effective date. </p> <p>Note: The effective date must be on the first day of a pay period.</p>
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<p>Why are you making this change? *</p> <ul style="list-style-type: none"> <li>Data Change &gt;</li> <li>Demotion &gt;</li> <li>Lateral Move &gt;</li> <li>Promotion &gt;</li> <li>Transfer &gt;</li> </ul>	<p><b>Step 7</b> Use the list icon to select the change reason. </p> <p>Note: The change reason will drive which sections are available for you to populate next.</p> <p>If any of the following steps in this job aid refer to sections that do not display on your screen, skip to the next applicable step.</p>
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<p>Who will be the manager after this change? 8</p> <p>X Susan Supervisor </p> <p>Which team will this person be on after this change?</p> <p>X Susan Supervisor </p> <p>Where will this person be located after this change? * 9</p> <p>X Worcester Plant </p> <p>Do you want to use the next pay period?</p> <p><input type="checkbox"/></p> <p>Cancel <b>Start</b> 10</p>	<p><b>Step 8</b> If a manager change is being done, type the manager's name or use the list icon to select the new manager. </p> <p>If you select a new manager, you must also select the new manager's team. </p> <p><b>Step 9</b> If your employee is moving to a new work location, type the location name or use the list icon to select the new location. </p> <p><b>Step 10</b> Click <b>Start</b>.</p>
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If the new manager differs from the current manager, the next page will ask “What do you want to do with the opening left on your team?” The default is “I plan to backfill this headcount.” **Select “Move this headcount to the new manager”** if an additional position is not required and/or you are not planning to backfill.

**Step 11**

If your employee is moving into a new position, use the pencil icon to select the new position. 

An open position must already exist to select from. If an open position does not exist, please contact your HRBP.

If you are promoting an employee or updating their job title, the Position does not need to be edited. This will be updated after the completion of the approval(s).

**Step 12**

If you are eliminating your employee's current position and will not be replacing him/her, check the box under Close Position.


If you want to allow for overlap, check the box under Available for Overlap. This will allow the opportunity to hire another employee into the position before it is vacant which may be ideal for training purposes.

**Step 13**

The new Job Profile will populate based on the new position you selected in Step 11.

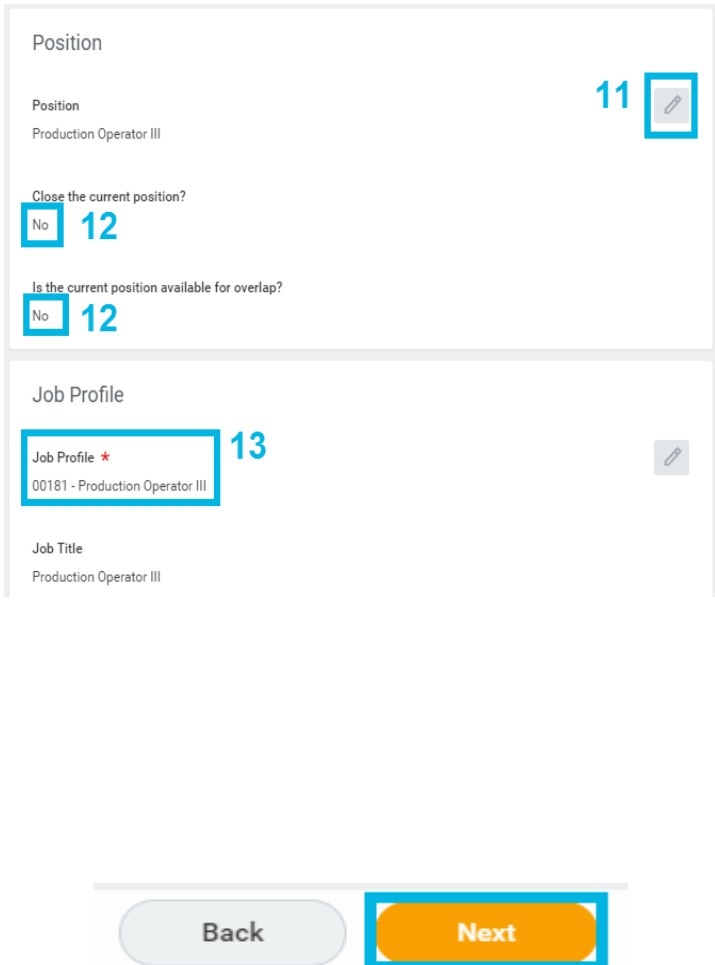
Click **Next**.

**Step 14**

If your employee's Location, Weekly Hours and/or Work Shift are changing, use the pencil icon to edit applicable information in the Location section. 


**Step 15**

Click **Next**.



Position


Position  
Production Operator III

11 

Close the current position?  
 No 12

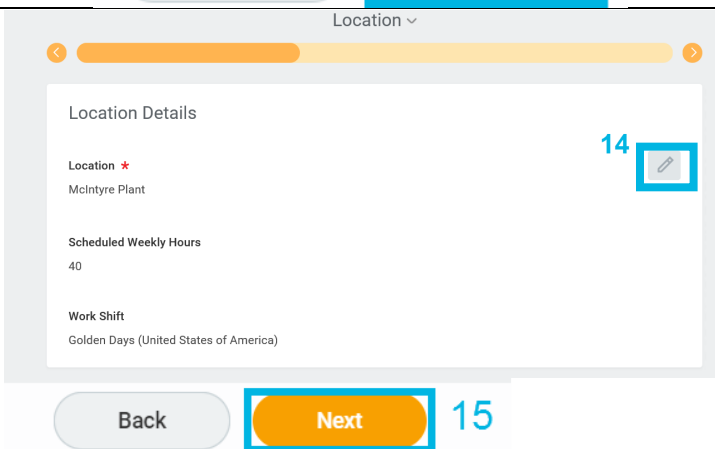
Is the current position available for overlap?  
 No 12

Job Profile

Job Profile \* 13  
00181 - Production Operator III 


Job Title  
Production Operator III

Back Next



Location ▾

Location Details

Location \* 14 

McIntyre Plant

Scheduled Weekly Hours  
40

Work Shift  
Golden Days (United States of America)

Back Next 15


Details ▾

Job Classifications

Additional Job Classifications  
6 - Craft Workers (United States EEO-1-United States of America); FT8 - 8 Hour Holidays (Holiday Schedules); H2 - Hourly 2 Weeks (Leave Plans)

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Administrative

Employee Type \* 16   
Regular

Time Type \*  
Full time

Pay Rate Type  
Hourly

Back Next 17

**Step 16**

If your employee's Employee Type, Time Type, Pay Rate Type, or Default Weekly Hours are changing, use the pencil icon to update. 

**Step 17**

Click **Next**.

Attachments ▾

Documents

Add 18

Back Next 19

**Step 18**

If you have any attachments to add, click **Add** and follow the on-screen prompts.


**Step 19**

Click **Next**.

Organizations ▾


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Company

Company  
CoorsTek Inc 20 


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Cost Center


Cost Center  
4210 GLD S/C 4 GRIND MEDIA PR 21 

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Other

CoorsTek Business Unit 22 

13000 600 9th St


Direct/Indirect 21 

Direct

23


Back
Next


**Step 20**

If your employee's Company is changing, use the pencil icon to edit. 

Note: Changes to Company are rare. Coordinate with your HR Business Partner.

**Step 21**

If your employee's Cost Center is changing, use the pencil icon to edit. 

Update Direct/Indirect field if applicable. 

**Step 22**

If your employee's Business Unit is changing, use the pencil icon to edit. 

**Step 23**

Click **Next**.

Compensation ▾

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Total Base Pay

Total Base Pay  
18.00 USD Hourly 24

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Primary Compensation Basis

Basis  
(empty)

Basis Details  
0.00 USD Hourly

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Guidelines

Pay Range 25   
18.00 - 23.80 USD Hourly

Compensation Package  
Coorstek Compensation Package

Grade  
A4

Grade Profile  
A4-US3

Step  
(empty)

Progression Start Date  
(empty)

If your employee's compensation is changing, complete steps Steps 24 – 30. If your employee's compensation will remain the same, skip to Step 31.

**Step 24**

Review your employee's Total Base Pay (current base pay before the change).

**Step 25**

Review the Pay Range which will default based on the Compensation Grade and Grade Profile associated with your employee's updated job details (i.e. position, job profile, location).

Salary

Add

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Hourly

Assignment Details 26  
18.00 USD Hourly ✕ ✎

Plan Name  
Hourly Plan

Effective Date  
05/01/2017

Add

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Period Salary

Add 27

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Allowance

Add 28

**Step 26**

Use the pencil icon to edit either the salary or hourly assignment details. ✎

The correct salary or hourly plan will automatically be expanded with default information based on job profile and compensation grade profile.

**Step 27**

For Non-US countries, click **Add** to add a Period Salary plan, if applicable.

**Step 28**

For Non-US countries, click **Add** to add an Allowance plan, if applicable.

Merit

Assignment Details 29  
2.50% Annual added ✕ ✎

Plan Name  
Merit - USA added

Effective Date  
11/13/2017 added

Add

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Bonus

Assignment Details 30  
0% Annual added ✕ ✎

Plan Name  
Annual Incentive Plan added

Effective Date  
11/13/2017 added

Assignment Details 31  
3% Quarterly ✕ ✎

Plan Name  
Quarterly Incentive Plan

Effective Date  
09/22/2017

Back Next

**Step 29**

Review the Merit plan information which will automatically populate based on your employee's job profile.

Note: Merit should not be edited. If there is a discrepancy with this assignment, you should contact your HRBP.

**Step 30**

Review the Bonus Plan assignment(s) which will automatically populate based on job profile.

Note: Bonus assignment(s) should not be edited. If there is a discrepancy with the assignment, you should contact your HRBP

**Step 31**

Click **Next**.

**Start**

Start Details

When do you want this change to take effect? \*  
11/13/2017

Why are you making this change? \*  
Change Employee Type

Who will be the manager after this change?  
Dean Trebilcock

Which team will this person be on after this change?  
Dean Trebilcock

Where will this person be located after this change?  
9th Street Plant

Do you want to use the next pay period?  
Yes

**33**

Submit Save for Later Cancel Guide Me

**Step 32**

A summary of the transaction will now be displayed. Review and validate all information is correct.

If necessary, use the pencil icon to edit details in a section.

**Step 33**

Click **Submit**.

**Up Next** **34**

Review: Receiving Manager  
Due Date 11/13/2017

**Details and Process**

For **35**

Overall Process Data Change:  
Overall Status In Progress  
Due Date 11/13/2017

Details **Process** **36**

Process History, 2 Items **36**

Process	Step	Status	Completed On	Due Date	Person
Change Job	Change Job	Step Completed	11/06/2017 02:28:59 PM	11/13/2017	
Change Job	Review: Receiving Manager	Awaiting Action		11/13/2017	

**Step 34**

Review the “Up Next” message which notes next person in the process. This person will receive the transaction in their Inbox.

**Step 35**

Click on the arrow next to Details and Process to view where the transaction is at any time.

**Step 36**

Click on Process to view the status of the transaction. If Awaiting Action, you can view who the transaction is sitting with.

**Step 37**

Click **Done**

**FAQ's**

**Why did I have additional steps or fewer steps than included above?** When you are completing a job change, Workday will guide you through only those sections that may be applicable based on the change reason selected. If you have questions on any additional or removed steps, please contact your HR Business Partner.

**How can I see what is happening with this employee to know when this process is complete?** After you submit the job change, you can view the Details and Process at anytime by going to your Inbox and clicking on the Archive tab. There may be several to do tasks to be completed.

The screenshot shows a software interface with a blue header labeled 'Inbox'. Below the header, there are two tabs: 'Actions (1)' and 'Archive'. The 'Archive' tab is selected. Underneath, there is a 'Sort By: Newest' dropdown menu and a 'From Last 30 Days' filter. A list item is visible with the text 'Terminate: 15 minute(s) ago - Successfully Completed'. To the right, a 'View Event' panel is open for the 'Terminate' event. It shows the event name 'Terminate', a timestamp '15 minute(s) ago - Successfully Completed', and a list of details: 'Overall Process: Terminate', 'Overall Status: Successfully Completed', 'Due Date: 15/11/2017', and 'Calendars In Use: Consecutive Days (No Calendars Selected)'. At the bottom of the 'View Event' panel, there are two tabs: 'Details' (selected) and 'Process', and a 'View Details' button.

**What approvals will the transaction go through?** Your HRBP will approve any transaction submitted via change job. If your transaction also includes a compensation change, then additional approvals in your management chain and the Compensation department may occur. Please refer to the Business Process Matrix for more details.

**What is the difference between Location Weekly Hours, Default Weekly Hours, and Scheduled Weekly Hours?** Location Weekly Hours is the standard for Full-Time employees at a location (i.e. 40 hours in the U.S.). The Default Weekly Hours matches the Location Weekly Hours. Scheduled Weekly Hours will match the Default Weekly Hours unless manually updated. Scheduled Weekly Hours should be updated, if necessary, to match the employees regularly scheduled work hours.