Employee Changes: Manage Employee Job Changes

JOB CHANGE

This job aid provides managers step-by-step instructions on how to use Workday for employee and contingent worker job changes, including transfer, promote, change job, terminate, and convert contingent workers to employees.

- Transfer, Promote, or Change Job
- Terminate an Employee

TRANSFER, PROMOTE, OR CHANGE JOB

This task is used for a variety of employee changes, such as manager and/or location changes, career ladders, reclassifications, updates to contingent workers, and more. Approvals for these requests involve managers, HR Business Partners, and the Compensation team. As you walk through the process of submitting this task, review and complete any applicable fields.

List of Definitions:

- Career Ladder – Use for requesting an established career ladder advancement of an employee from one job level to the next within the same job family (i.e. job level 1 to 2)
- Change Contract Details – Use for updating information on contract/temp workers
- Change Location – Use for changing the physical work location for the employee
- Date Change – Use for corrections or other changes not listed
- Job Reclassification – Use for requesting a change in the assignment of an existing position (with or without an incumbent) to a new job and/or grade profile
- Move to Another Position on My Team – Use for moving an employee to a different role in the same job profile (must be an open position)
- Move to another manager – Use for changing the supervisor an employee reports to

From the employee’s profile:

1. Select Actions.
2. Select Job Change > Transfer, Promote or Change Job.

3. Under Start Details, fill out required fields:

   - When do you want this change to take effect?
   - Why are you making this change?
   - Who will be the manager after this change?
   - Which team will this person be on after this change?
   - Where will this person be located after this change?

4. Select .

5. Enter the effective date for the transfer below When do you want this change to take effect?

   Note: Effective Dates must coincide with the first day of a pay period. (i.e.: every other Sunday)

6. Select the reason for the transfer below Why are you making this change?

7. If applicable, use the search box to find the new manager below Who will be the manager after this change?.

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8. Enter the same manager’s name below **Which team will this person be on after this change?**.

9. If the work location is changing, use the search box to find their new location below **Where will this person be located after this change?**.

10. Once you have made all your selections, click **Start**.

The next screen displays a list of sections with position and employee information.

11. Update each section as needed for the type of job change:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job</strong></td>
<td><strong>Job</strong> is an area that contains details related to the position, job profile, and business/working title.</td>
</tr>
<tr>
<td><strong>Location</strong></td>
<td><strong>Location</strong> is the primary place where the employee will be physically working.</td>
</tr>
<tr>
<td><strong>Attachments</strong></td>
<td>Attachments is where you can upload any supporting documentation related to the request. For example, department director email approval, budget approval, or written rationale.</td>
</tr>
<tr>
<td><strong>Organizations</strong></td>
<td>This section allows you to update the cost center and business unit (division), if applicable.</td>
</tr>
<tr>
<td><strong>Compensation</strong></td>
<td>Enter or select the compensation details for the employee. This may be a dollar amount, or a step for union-represented employees.</td>
</tr>
<tr>
<td><strong>Summary</strong></td>
<td>This is a summary of all the previous sections. Review the information to ensure it is correct before submitting.</td>
</tr>
</tbody>
</table>

12. Click **Submit** once everything has been confirmed.

13. Workday displays a pop-up indicating you have completed the task. From the pop-up, select **View Details**.

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14. Select the Details and Process arrow and navigate to the Process tab to view next steps in the Change Job business process. The Status field indicates whether there are any required actions or steps to complete and who they are assigned to.

**TERMINATE AN EMPLOYEE**

As a manager, you may have to terminate an employee after you ask them to leave or if the employee resigns.

To do this, complete the following actions from an employee’s profile:

1. Select **Actions**.
2. Select **Job Change > Job Change > Terminate Employee** to display the Terminate Employee page.

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Note: You can also manage job changes by navigating to the My Team Management application.
3. Complete the Reason by selecting edit and entering the Primary Reason.
   a. Involuntary reasons are reasons used by the city for terminations related to policy.
   b. Voluntary reasons are for reasons that the employee is terminating with the city due to personal reasons.

4. If there is more than one reason for the termination, please select all that apply under the “Secondary Reasons.”

5. Select Edit dates.
   a. Enter Termination Date: Termination Date is the date when the employee will no longer be considered an employee of Salt Lake City
   b. Enter Last Day of Work: Last Day of Work is the last day the employee will physically be working.

   c. Enter Pay through Date: Pay through Date is the last day that an employee physically works or using approved leave time.

      Note: The employee will still have an active status until midnight on the termination date.

6. Indicate whether you will overlap after this termination.

      Note: Position overlap allows you to hire a replacement worker into the same position before the current worker leaves. Your department will have to have the budget to pay for the overlap time.

7. Add and documentation for the termination to the “Attachments” section, this will include resignation letters/emails or letters provided to the employee about the city’s decision for termination.

8. Select Submit.