MANAGER, HRTC, GLOBAL MOBILITY, FINANCE PARTNER JOB AID

JOB CHANGE – TRANSFER, PROMOTE OR JOB CHANGE: INTERNATIONAL EMPLOYEES

The functionality that can be performed in the Job Change business process is diverse. Managers can perform a wide variety of transactions on an employee within their Supervisory Organization including:

- Job Profile Updates
- Scheduled Weekly Hours changes (full-time to part-time and vice versa)
- Transfers to other IMTs and Account Groups (includes Manager [Supervisory Organization] change outside the IMT, without location change)

**NOTE:** Managers for internationally based employees should reach to their Human Resource Talent Consultant (HRTC) or Global Mobility Specialist, who will then initiate Job Change transaction that involve a change in location. In addition, when an employee is involved in any type of Company move (domestic to international and vice versa), the manager should reach to their HR Talent Consultant or Global Mobility Specialist as well.

**NOTE:** Compensation changes should not be initiated through Job Change. If a compensation adjustment is warranted resulting from any of the transactions highlighted above, a Senior Associate or above should process the compensation change through the Compensation - Request Compensation Change business process (please refer to the Request Comp Change job aid for detailed instructions).

**NOTE:** There are a variety of condition rules that determine which steps trigger for each of the transactions listed above. Some steps identified may or may not trigger depending on the attributes of the employee or scenario. If a step does not trigger, continue to move through the process as specified by Workday.

**NOTE TO HRTCs/GLOBAL MOBILITY:** See the Global Mobility/HRTC job aid for details on how to initiate Job change transactions that involve a location change.
JOB PROFILE UPDATES

Use this job aid to update an employee’s Job Profile, if it is incorrect.

CAREER MANAGER JOB AID

A manager can update an employee’s Job Profile (formerly known as functional job title) if it is incorrect. The manager must ensure that the correction made to an employee’s Job Profile aligns to the employee’s current management level. Managers should reach to their HR Talent Consultant for questions or help in determining the appropriate Job Profile.

1. Click the My Team worklet on the homepage, then click My Org Chart and select employee. Alternately from the homepage, type the employee’s name or employee ID into the Search Bar.

2. Next to the employee’s name, click on Actions.

3. Click Job Change, then select Transfer, Promote, or Change Job.

4. Click the pencil icon to edit the Job Profile:

   - Enter the date the change is to take effect.
   - Why are you making this change – Reason selected must be Job Change.
• Who will be the manager – Auto populated with the employee’s current career manager.
• Which team will this person be on – Auto populated with the current Career Manager’s Supervisory Organization.
• Where will this person be located – skip if no change is necessary.

5. Click Start.

NOTE: Check the box Do you want to use the next pay period? the date for the change to take effect will automatically adjust to the beginning of the next pay period.

6. Within the Job tab, the Manager can update the Job Profile by clicking the pencil icon. Chose the new job profile by typing in all/part of the job profile in the search area and hit Enter. Alternately, you can select In This Org or By Job Family from the dropdown menu to narrow your search. The Job Title field will automatically populate once a Job Profile is selected.

7. Click Next, passing by the Location tab if no changes are needed.
8. Click Next, passing by the Details tab if no changes are needed.
9. Click Next, passing by the Organization tab if no changes are needed.
10. Click Next, passing by the Compensation tab (if visible).
11. Review Summary of the change(s) and make any necessary adjustments.
12. Click Submit or Save for Later.

SENIOR MANAGER JOB AID
REVIEW/APPROVAL JOB PROFILE CHANGE

Once Submitted, the request for a Job Profile change will be routed to the employee’s Senior Associate or above to review the details. If a Senior Associate or Above initiated the job profile change, then the request will route directly to the HR Talent Consultant.

13. Review the proposed changes as indicated by the blue dots.

   If no changes are needed, select Approve. If a correction needs to be made, select Send Back and provide reason/comments.

GLOBAL MOBILITY JOB AID
REVIEW CHANGE JOB (SUPERVISORY ORGANIZATION) JOB PROFILE CHANGE

14. While Managers do not have access to modify employee type, job classification, company codes or compensation through this BP, please review to ensure changes are not required.
15. If changes are required, select the **pencil icon** to modify the incorrect value.

**FINANCE BUSINESS PARTNER JOB AID**

**REVIEW/APPROVAL JOB PROFILE CHANGE**

When a job profile change is made, the Finance Business Partner (SBS representative) will receive an *action* or *‘To Do’* if the change results in a move between FSOs (e.g. Cyber to Engineering and vice versa). The Finance Business Partner will need to update an employee’s RC when a FSO has changed.

16. From the **homepage**, type the **employee’s name** or **employee ID** into the Search Bar.

17. Under the **Job tab**, select **RC Code**.

18. Under **Worker Position** (toward the bottom of the screen), click **Actions** next to the employee’s name.

19. Click **Additional Data**.

20. Select **Edit Effective-Dated Custom Object**.

21. Enter the **date** the RC change is to take effect.

22. Select **Edit Additional Data**.
23. Type the correct 4-digit RC Code in the My RC Code box.

24. Click Submit.

25. Return to your Workday Inbox and click Submit to complete the ‘To Do’ step and close out the location change business process.

HRTC/GLOBAL MOBILITY/BAH EXEC SERVICES JOB AID

Depending on the employee type, either the HRTC (Regular), Global Mobility Specialist (Assignees) or BAH Executive Services (VPs and above) will receive an action to Manage Employee Contract. See the Employee Contract: Managing Employment and Assignment Agreements for details on how to complete this task.

HR TALENT CONSULTANT JOB AID

MANAGE BUSINESS PROCESSES FOR WORKER

If the worker is part of in progress business processes, the HR Talent Consultant will receive an action in the Workday Inbox titled Manage Business Processes for Worker. To determine what the pending business processes are, you should click on the tab Business Processes about the Worker. The HR Talent Consultant will need to review each of the business processes listed and determine whether the action needs to be reassigned to someone else, cancelled etc. In some instances, you may not know who to reassign a business process to and you will need to contact the employee’s manager for guidance.

After you have addressed each of the business processes, you should click Submit.

SCHEDULED WEEKLY HOURS CHANGES

Use this job aid to update an employee’s scheduled weekly hours, if necessary.

CAREER MANAGER JOB AID

SCHEDULED WEEKLY HOURS CHANGES

A manager can update an employee’s scheduled weekly hours (number of hours worked per week) as necessary. The number of hours worked per week determines whether an employee is considered to be full-time or part-time. Anyone working less than 20 hours per week is considered an hourly employee, and not benefits eligible.

1. Click the My Team worklet on the homepage, then click My Org Chart and select employee. Alternately from the homepage, type the employee’s name or employee ID into the Search Bar.

2. Next to the employee’s name, click Related Actions.

3. Click Job Change, then select Transfer, Promote, or Change Job.
4. Click the **pencil icon** to edit the Job Profile.

5. Enter the **date** the change is to take effect.

6. **Why are you making this change** – Reason selected must be **Job Change**.

7. **Who will be the manager** – Auto populated with the employee’s current career manager.

8. **Which team will this person be on** – Auto populated with the current Career Manager’s Supervisory Organization.

9. **Where will this person be located** – skip if no change is necessary.

5. Click **Start**.

   **NOTE:** Check the box **Do you want to use the next pay period?** the date for the change to take effect will automatically adjust to the beginning of the next pay period.

6. Click **Next**, passing by the **Job tab** if no changes are needed.

7. Within the **Location tab**, the Manager can update the Scheduled Weekly Hours by clicking the **pencil icon**. Type in the **number of hours per week** the employee is scheduled to work (hours entered must be in increments of five (5)).

   - 40 hours per week is considered **full-time**
• 20 – 35 hours per week is considered **part-time**

• Scheduled weekly hours less than 20 is considered **hourly** (Hourly employees are ineligible to participate in the firm’s benefit programs)

8. Click **Next**. On the **Details tab**, click the **pencil icon** to update the **Time Type** field and select **Full-Time or Part-Time** based on the new scheduled weekly hours. If the employee will be working less than 20 hours, you will need to update the **Pay Rate Type field** and select **Hourly**. FTE field will auto populate the new % participation rate based on the scheduled weekly hours entered.

9. Click **Next**, passing by the **Organization tab** if no changes are needed.

10. Click **Next**, passing by the **Compensation tab** (if visible). Total Base Pay, Salary will be automatically prorated based on the scheduled weekly hours entered.

11. Review **Summary** of the change(s) and make any necessary adjustments.

12. Click **Submit or Save for Later**.

**GLOBAL MOBILITY JOB AID**

**REVIEW CHANGE JOB (SUPERVISORY ORGANIZATION) JOB PROFILE CHANGE**

13. While Managers do not have access to modify employee type, job classification, company codes or compensation through this BP, please review to ensure changes are not required.

14. If changes are required, select the **pencil icon** to modify the incorrect value.

**SENIOR MANAGER JOB AID**

**REVIEW/APPROVAL JOB PROFILE CHANGE**

Once Submitted, the request for a Job Profile change will be routed to the employee’s Senior Associate or above to review the details. If a Senior Associate or Above initiated the job profile change, then the request will route directly to the HR Business Partner.

15. Review the proposed changes as indicated by the **blue dots**.

16. If no changes are needed, select **Approve**. If a correction needs to be made, select **Send Back** and provide reason/comments.

   **NOTE:** Anytime an employee reduces their scheduled weekly hours, compensation is automatically prorated. As such, the compensation business process kicks off, thinking the employee is getting an increase or decrease in compensation.

**FINANCE BUSINESS PARTNER JOB AID**

**REVIEW/APPROVAL JOB PROFILE CHANGE**

When a change is made, the Finance Business Partner (SBS representative) will receive an **action** or **To Do** if the change could trigger a change for the RC code.
To modify the RC:

17. From the **homepage**, type the **employee’s name** or **employee ID** into the **Search Bar**.

18. Under the **Job tab**, select **RC Code**.

19. Under **Worker Position** (toward the bottom of the screen), click on **Actions** next to the employee’s name.

20. Click **Additional Data**.

21. Select **Edit Effective-Dated Custom Object**.

22. Enter the **date** the RC change is to take effect and **OK**.

23. Select **Edit Additional Data**.

24. Type the correct **4-digit RC Code** in the **My RC Code** box.

25. Click **Submit**.

26. Return to your **Workday Inbox** and click **Submit** to complete the **To Do** step and close out the location change business process.
HRTC/GLOBAL MOBILITY/BAH EXEC SERVICES JOB AID

Depending on the employee type, either the HRTC (Regular), Global Mobility Specialist (Assignees) or BAH Executive Services (VPs and above) will receive an action to Manage Employee Contract. See the Employee Contract: Managing Employment and Assignment Agreements for details on how to complete this task.

HR TALENT CONSULTANT JOB AID

MANAGE BUSINESS PROCESSES FOR WORKER

If the worker is part of in progress business processes, the HR Talent Consultant will receive an action in the Workday Inbox titled Manage Business Processes for Worker. To determine what the pending business processes are, you should click on the tab ‘Business Processes about the Worker’. The HR Talent Consultant will need to review each of the business processes listed and determine whether the action needs to be reassigned to someone else, cancelled etc. In some instances, you may not know who to reassign a business process to and you will need to contact the employee’s manager for guidance.

After you have addressed each of the business processes, you should click Submit.

TRANSFERS TO OTHER IMTS AND ACCOUNT GROUPS

In Workday, an employee’s Supervisory Organization is separated from his/her Account Group or IMT alignment. All the business processes in Workday flow according to the alignment of the Supervisory Organization. An employee’s alignment to a Supervisory Organization is decoupled from TOL as well. Changes to an employee’s Manager – or Supervisory Organization can be made, regardless of IMT alignment through Job Change. The employee’s current manager should initiate the Manager Change outside the IMT business process.

Discussions about transferring an employee to another IMT should occur outside of Workday before the process is initiated. Once leaders from the giving and receiving teams have agreed to an employee transfer (defined as a different IMT or Account Group), the employee’s current Career Manager can initiate the transfer business process in Workday through Job Change. Leaders from the giving and receiving teams should discuss plans for what will happen to the Position when the employee transfers (e.g. will the position be backfilled or will the position move with the employee).

NOTE: If the transfer to other IMTS or Account Groups will result in a location change (e.g. US to foreign location, foreign location to foreign location or foreign location to US), please reach to your Human Resource Business Partner (HRBP) or Global Mobility Specialist, who will then initiate Job Change transaction that involve a change in location.

CAREER MANAGER JOB AID

TRANSFERS TO OTHER IMTS AND ACCOUNT GROUPS IN SAME FOREIGN LOCATION

1. Click the My Team worklet on the homepage, then click My Org Chart and select employee. Alternately from the homepage, type the employee’s name or employee ID into the Search Bar.
2. Next to the employee’s name, click **Actions**.

3. Click **Job Change**, then select **Transfer, Promote, or Change Job**.

4. Click the **pencil icon** to edit the characteristics of the Transfer.
   
   - Enter the **date** the change is to take effect.
   - Why are you making this change – Reason selected must be **Job Change**.
   - Who will be the manager – Type in the name of the **new Career Manager**.
   - Which team will this person be on – Auto populated with the new Career Manager’s Supervisory Organization.
   - Where will this person be located – skip if no change is necessary.

5. Click **Start**.

   **NOTE:** Check the box **Do you want to use the next pay period?** the date for the change to take effect will automatically adjust to the beginning of the next pay period.

6. Within the **Move tab**, the Current Manager will be asked what to do with the opening (current position) left on the team. There are **3 options** to choose from:
• **I plan to backfill this headcount** - If you plan to backfill this headcount, the receiving manager must have an **open position** to receive the employee into, or he/she will need to **create a position** prior to completing the transfer.

• **Move this headcount** to the new manager - If you move the headcount to the new manager, you will no longer have the position on your team to fill.

• **Close this headcount** - If you do not move the position and close the position, you will not be able to re-open it or fill it.

If the employee is a career manager, the current career manager will be asked **Do you want to move their team with them?** If you **Move the Headcount**, you will be required to move the team. If you **Backfill the Headcount**, you can choose whether to move the team or not.

7. Click **Submit** or **Save for Later**.

**NOTE:** If the employee is a Career Manager, the Current Manager is asked whether the employee’s team will move to the new Supervisory Organization with him/her. If a decision is made to **Move the Headcount to the New Manager**, the business process requires that the employee’s team move with him/her regardless. If the employee’s team members were not supposed to move with the employee, instructions for correcting the transfer of team members to new Supervisory Organizations can be found at the end of the job aid.

**CURRENT SENIOR MANAGER JOB AID**

**REVIEW/APPROVE TRANSFER**

Once submitted, the request for transfer will be routed to the employee’s current Senior Associate or above. If a Senior Associate or above initiated the transfer, the request will route directly to the New (receiving) Career Manager.

8. Review the proposed changes as indicated by the **blue dots**.

9. If no changes are needed, select **Approve**. If a correction needs to be made, select **Send Back** and provide **reason/comments**.

**NEW (RECEIVING) MANAGER JOB AID**

**REVIEW/APPROVE TRANSFER**

After the employee’s current Senior Associate or above Approves the transfer, the request is routed to the employee’s New (receiving) Career Manager. It is important for the new career manager to understand whether the current manager selected **I plan to backfill the headcount**. If the current Manager plans on backfilling the position, the new manager must have an open position to receive the employee into or create a position (see **Create a New Position** job aid) prior to completing the transfer.

If the employee transferring is a Career Manager, the NEW Career Manager is asked whether the employee’s team will move to the new Supervisory Organization with him/her. If a decision was made to
Move the Headcount to the New Manager, the business process requires that the employee’s team move with him/her regardless. If the employee’s team members were not supposed to move with the employee, instructions for correcting the transfer of team members to new Supervisory Organizations can be found at the end of the job aid.

10. Review proposed changes as indicated by the **blue dots**.

11. If corrections to the Start Details need to be made, the New Career Manager should click on the **pencil icon**, make the appropriate adjustments. To review the rest of the proposed changes, select **Guide Me** to easily view all data fields that may need to be updated based on the transfer.

![Image of a transfer process]

**IF CURRENT MANAGER BACKFILLS:**

- **Move Section**: If the employee is a manager, you will be asked **Do you want to move their teams with them?** This should have been discussed prior to initiating the transfer.

- **Job Section**: If the current manager plans on Backfilling the Position, the **Position** field will show as empty. In the **Position field**, use the **dropdown menu** to select **Positions with Requisitions** or **Positions without Requisitions** then chose the appropriate Position. Once the position is selected, the **Job Profile** and **Job Title** fields will automatically update. **It is very important that you select a position that is at the employee’s current management level.**

- **Location Section**: Click **Next**, passing by the Location details if no changes are needed.

- **Details Section**: Click **Next**, passing by the Details tab if no changes are needed.
• **Organizations Section**: Ensure the IMT has updated correctly. Click the **pencil icon** to **correct the IMT**, if necessary then click **Next**.

• **Compensation Section**: Click **Next**, passing by the Compensation tab (if visible).

**IF CURRENT MANAGER MOVES HEADCOUNT WITH EMPLOYEE:**

• **Move Section**: If the employee is a manager, you will be asked **Do you want to move their teams with them?** Select **Yes. Move the team with the employee.** You will **not** be able to proceed if you select **No. Keep the Team.**

• **Job Section**: If the current manager Moves the Headcount, no changes are required (unless the Job Profile needs to be corrected). If the Job Profile is changed, the Job Title field will automatically update. Click **Next**.

• **Location Section**: Click **Next**, passing by the Location details if no changes are needed.

• **Details Section**: Click **Next**, passing by the Details tab if no changes are needed.

• **Organizations Section**: Select the **new IMT** from the **dropdown menu**. Click **Next**.

• **Compensation Section**: Click **Next**, passing by the Compensation tab (if visible).

12. Select **Approve** or **Send Back** and provide **reason/comments**.

**NEW SENIOR MANAGER JOB AID**

**REVIEW/APPROVE TRANSFER**

After the new Career Manager Approves the Transfer, the request is routed to the employee’s New (receiving) Career Manager’s Senior Manager (Senior Associate or above).

13. Review the proposed changes as indicated by the **blue dots**.

14. If no changes are needed, select **Approve**. If a correction needs to be made, select **Send Back** and provide **reason/comments**.

**GLOBAL MOBILITY JOB AID**

**REVIEW CHANGE JOB (SUPERVISORY ORGANIZATION)**

15. While Managers do not have access to modify employee type, job classification, company codes or compensation through this BP, please **review** to ensure changes are not required.

16. If changes are required, select the **pencil icon** to modify the incorrect value.

**FINANCE BUSINESS PARTNER JOB AID**

When an employee transfers to a new IMT, the Finance Business Partner (SBS representative) will receive an **action** or a ‘**To Do.**’ If changes to the employee’s Cost Center and FSO are also made during the
transfer, the Finance Business Partner will need to update the employee’s RC resulting from all these specific changes:

17. From the **homepage**, type the **employee’s name** or **employee ID** into the **Search Bar**.

18. Under the **Job tab**, select **RC Code**.

19. Under **Worker Position** (toward the bottom of the screen), click **Related Actions** next to the employee’s name.

20. Click **Additional Data**.

21. Select **Edit Effective-Dated Custom Object**.

22. Enter the **date** the RC change is to take effect, click **OK**.

23. Select **Edit Additional Data**.

24. Type the correct **4-digit RC Code** in the **My RC Code** box.

25. Click **Submit**.

26. Return to your **Workday Inbox** and click **Submit** to complete the ‘To Do’ step and close out the location change business process.
CORRECTING THE TRANSFER OF TEAM MEMBERS TO NEW SUPERVISORY ORGANIZATIONS

The Transfer business process requires a Career Manager’s direct/indirect reports to move with him/her to the new Supervisory Organization, whether it is the desired outcome or not. If it was intended for only the Career Manager to be transferred to a new Supervisory Organization, members of the team can be transferred to the appropriate Career Manager Supervisory Organization by either:

1. Moving each member of the team to the appropriate Supervisory Organization prior to initiating the Career Manager’s change outside the IMT (recommended option).

   or

2. Initiating a Job Change → Transfer, Promote or Change Job → Job Change after the team is moved to the new Supervisory Organization with their Career Manager (Follow instructions at the top of this job aid for transferring each employee to the appropriate Supervisory Organization).