

Job Change - Promotion

Contents

Icon Key 2

Introduction 3

Before You Begin..... 3

Step 1: Access the Change Job task 3

Step 2: Start the Change Job Task..... 4

Step 3: Enter the Information for the Promotion 5

 Screen 1: Position 5

 Screen 2: Location..... 7

 Screen 3: Details 8

 Screen 4: Organizations 11

 Screen 5: Summary 11

Step 4: Propose and Submit a Compensation Change 11

What happens next..... 15

Checking the status of the action 15

Icon Key

There are a few icons that you will see and use throughout the process. Screenshots and descriptions can be found below.



The **Prompt** button (three dots and three lines) is available for many of the fields throughout all processes. Clicking the **Prompt** button will display the available options for the field as well as allow you to search using your keyboard.



The **Pencil** icon will be shown on all sections of the process that you will have the ability to edit. Clicking the **Pencil** icon will take you into edit mode for that section.



The **Remove** icon will be shown for all sections where you can remove completely the information shown there. Clicking the **Remove** icon will delete all information shown in that section.



The **Undo** icon will be displayed any time you are in edit mode for a section. Clicking the **Undo** icon will exit edit mode without saving your changes.



The **Check Mark** icon will be displayed any time you are in edit mode for a section. Clicking the **Check Mark** icon will save your changes and exit edit mode.

Introduction

A Promotion is the act of assigning an employee to a job that has more responsibility and higher compensation within your Supervisory Organization. This job aid explains how to enter an employee's Promotion into the Workday system.

Before You Begin

Before you begin the action to promote an employee, answer these two questions:

Question 1: Will you continue to be the employee's manager?

- If yes, continue to **Question 2**.
- If no, you do not need to take any action. Instead, the employee's new manager will perform the **Request Transfer** action.

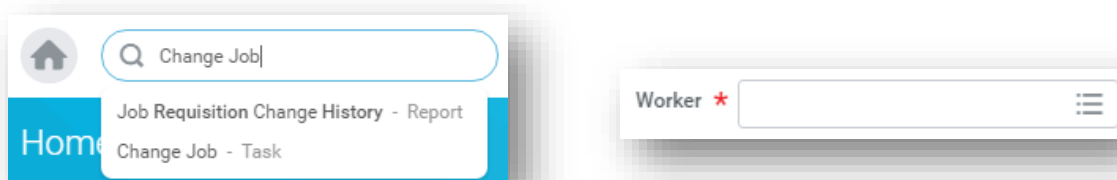
Question 2: If you will continue be the employee's manager, do you have an open requisition into which to move the employee?

- If yes, continue to **Step 1**.
- If no, call your Human Resources department to request that the job be created.

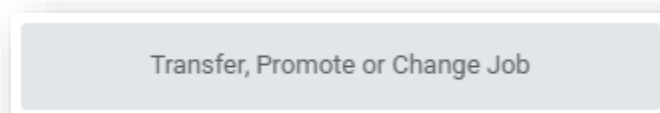
Step 1: Access the Change Job task

There are 3 different ways to access the **Change Job** task.

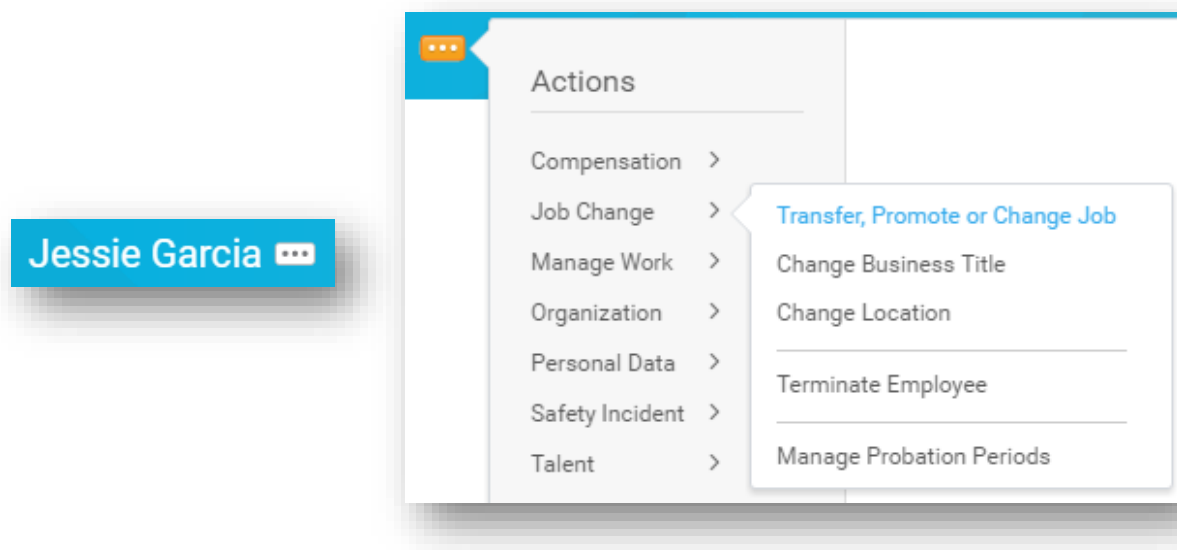
Option 1: Type **Change Job** in the Workday search box and click the **Change Job** task. Enter the affected employee's name in the **Worker** field and click **OK**.



Option 2: From the Workday home screen click the **My Team** worklet, then select the **Transfer, Promote or Change Job** task under **Actions**. Enter the affected employee's name in the **Worker** field and click **OK**.



Option 3: Look up the employee who you wish to promote. Click the **Related Actions** button next to their name, hover over **Job Change** and click **Transfer, Promote or Change Job**.



Step 2: Start the Change Job Task

The first screen of the **Promote** process is the **Start** screen. Here you will enter the basic information of the promotion.

Start Details

When do you want this change to take effect? *
12/11/2016

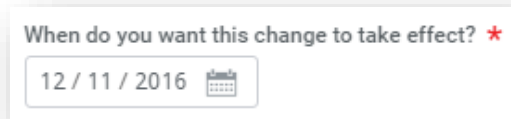
Why are you making this change? *

Who will be the manager after this change?
Michael Williams


Which team will this person be on after this change?
Human Resources Team (Michael Williams)

Where will this person be located after this change? *
TCSES - Chicago - 350 N Orleans Street

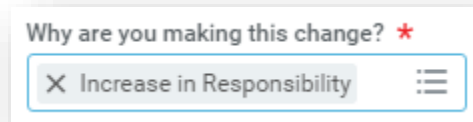
Click the **Pencil** icon to edit the information shown here. Enter the date on which the employee's promotion will be effective into the **When do you want this change to take effect?** field. When possible, this date should equal the start of a pay period. **Note: The system will default the effective date to the start of the next available pay period.**




When do you want this change to take effect? *

12 / 11 / 2016 

Click the Prompt button for the **Why are you making this change?** field and select **Increase in Responsibility**.



Why are you making this change? *

X Increase in Responsibility 

Leave **Who will be the manager after this change?**, **Which team will this person be on after this change?**, and **Where will this person be located after this change?** as is.

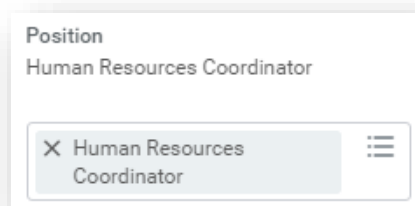
Click the **Check Mark** to save your changes and navigate to the next step by clicking **Start** at the bottom-left of the screen.

Step 3: Enter the Information for the Promotion

The next step in the process is to enter the rest of the information for the promotion. This step is broken down into 5 screens for a more user-friendly experience. The first screen is the **Job** screen. Here you will see 3 different sections; **Position**, **Job Profile**, and **Business Title**.


Screen 1: Position

Click the **Pencil** icon in the **Position** section to edit the information shown there. The **Position** field will show the current position held by the employee and allow you to select the new position just below it.



Position

Human Resources Coordinator

X Human Resources Coordinator 

To choose the new position, click the **Prompt** button for the **Position** field, click **Vacant Positions** and then choose the new position from the list.

The first screenshot shows a search bar with the text 'search' and a dropdown menu with two options: 'Vacant Positions' and 'Current'. The second screenshot shows the same search bar with a dropdown menu showing '← Vacant Positions' and 'Human Resources Generalist'.

The **Job Requisition** field will auto-fill with information from the selected **Position**.

Job Requisition
R0000266 Human Resources Generalist (Open)

If you do not plan to backfill the position that the employee is leaving, select **Close the current position**. If you do plan to hire someone into the position that the employee is leaving, leave the field unchecked.

Close the current position?

☒

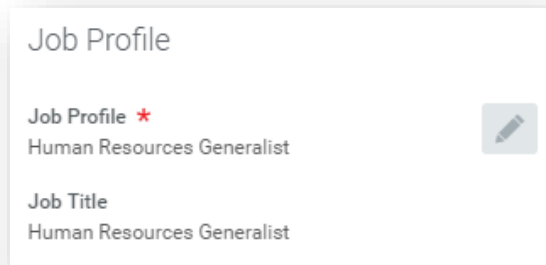
If you will need to hire someone into the position that the employee is leaving before the employee transfers into their new position, select **Is the current position available for overlap**. This will allow you to have two employees in the position at once.

Is the current position available for overlap?

☐

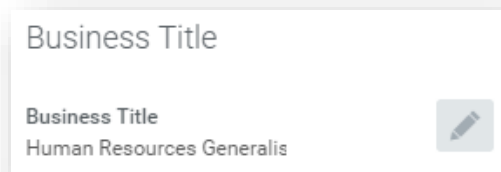
Click the **Check Mark** to save the information you entered in the **Position** section.

The **Job Profile** section will include two fields: **Job Profile** and **Job Title**. Both of these fields will auto-fill based on the position you selected in the **Position** section. Leave these two fields as they are.



The screenshot shows a 'Job Profile' section with two fields. The first field is labeled 'Job Profile' with a red asterisk and contains the text 'Human Resources Generalist'. To the right of this field is a pencil icon. The second field is labeled 'Job Title' and also contains the text 'Human Resources Generalist'.

The **Business Title** section will also auto-fill based on the position selected. Leave the field **Business Title** as is.



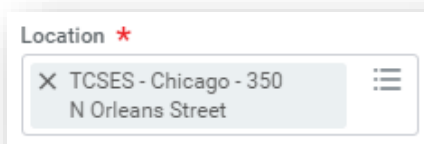
The screenshot shows a 'Business Title' section with one field labeled 'Business Title' containing the text 'Human Resources Generalis'. To the right of the field is a pencil icon.

Navigate to the next screen by clicking the **Next** button at the bottom-left of the screen.

Screen 2: Location

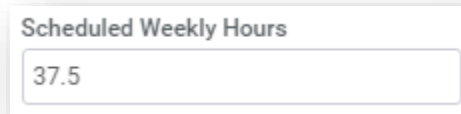
The **Location** screen will show two fields: **Location** and **Scheduled Weekly Hours**. Both of these fields will auto-fill based on the position selected previously. If you need to edit either of these fields, click the **Pencil** icon. **If you do not need to edit these fields, click the **Next** button at the bottom-left of the screen.**

The **Location** field displays the physical address assigned to the position. To select a different location, click the **Prompt** button, type the first few characters of the location and press the **Enter** key on your keyboard. This will display a list of matching locations. If there is only one matching location, Workday will populate the field with that location. For example, if the Worker will be at the TCS Education System office at 350 N Orleans St in Chicago, type “350” and press **Enter**.



The screenshot shows a 'Location' field with a red asterisk. A dropdown menu is open, displaying a single option: 'X TCSES - Chicago - 350 N Orleans Street'. To the right of the dropdown is a menu icon (three horizontal lines).

The **Scheduled Weekly Hours** field will display the number of hours the position is scheduled to regularly work in any given week. If you need to edit this field, simply type the correct number of ours in the field.



A screenshot of a form field labeled "Scheduled Weekly Hours". The field contains the text "37.5".

If you have made edits to the **Location** section, click the **Check Mark** to save your changes. To navigate to the next screen, click the **Next** button at the bottom-left of the screen.

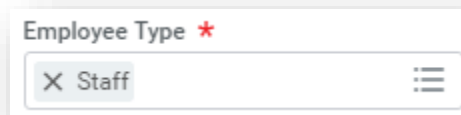
Screen 3: Details

The Details screen will include general information about the position. These details will auto-fill based on the position selected previously. **If you do not need to edit these fields, click **Next** at the bottom-left of the screen.**

The **Job Classifications** section is not currently in use. Ignore the **Job Classifications** section.

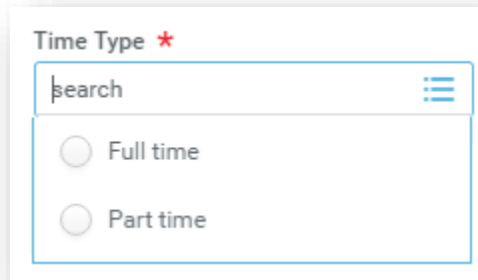
Click the **Pencil** icon for the **Administrative** section to edit the information shown there. The Employee Type field will display the employee type assigned to the position. Options are:

- **Adjunct:** includes **all** Adjunct positions
- **Faculty:** includes Faculty positions that are **not** Temporary
- **Federal Work Study:** includes Student Workers that qualify for the Federal Work Study program
- **Intern:** includes **all** Intern positions
- **Staff:** includes staff positions that are **not** Temporary
- **Student Worker:** includes Student Workers that do **not** qualify for the Federal Work Study program
- **Temporary:** includes Staff and Faculty positions that are Temporary



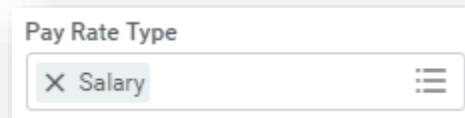
A screenshot of a form field labeled "Employee Type" with a red asterisk. The field contains the text "X Staff" and has a dropdown menu icon on the right.

The **Time Type** field will allow you to select whether the position is **Part time** or **Full time**. To make a change, click the **Prompt** button and choose one of the two options.



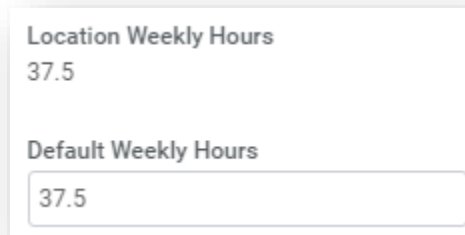
The screenshot shows a form field titled "Time Type" with a red asterisk. Below the title is a search bar with the placeholder text "search". To the right of the search bar is a menu icon. Below the search bar are two radio button options: "Full time" and "Part time".

The **Pay Rate Type** will display either **Salary** or **Hourly**. **Do not change this field.** If it does not reflect the correct information, contact Human Resources.



The screenshot shows a form field titled "Pay Rate Type". Below the title is a dropdown menu with a close button (X) and the text "Salary". To the right of the dropdown menu is a menu icon.

The **Location Weekly Hours** and **Default Weekly Hours** fields will display the default Full time hours set for the position's location. **Do not edit the Default Weekly Hours.**



The screenshot shows two form fields. The first field is titled "Location Weekly Hours" and displays the value "37.5". The second field is titled "Default Weekly Hours" and also displays the value "37.5".

The **FTE** field will display the Full Time Equivalency for the position. This is calculated by dividing the Scheduled Weekly Hours set on the Location screen by the Default Weekly Hours.



The screenshot shows a form field titled "FTE" displaying the value "100%".

Ignore the **Job Exempt**, **Job Classifications**, **Management Level**, **Company Insider Types**, **Workers' Compensation Code from Job Profile**, **Workers' Compensation Code Override** and **End Employment Date** fields.

Job Exempt

☒

Job Classifications
(empty)

Management Level
Staff/Faculty

Company Insider Types

Workers' Compensation Code from Job Profile
(empty)

Workers' Compensation Code Override

End Employment Date

The **First Day of Work** field will display the first day that the employee will be working in their new position. This field will auto-fill and should match the effective date selected in Step 2.

First Day of Work

12 / 11 / 2016

Ignore the **Notify By** field.

Notify By

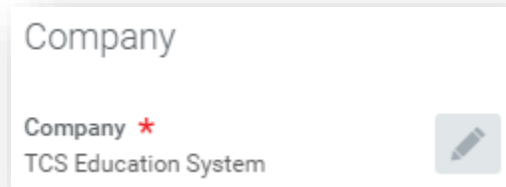
12 / 11 / 2016

If you made changes to the **Administrative** section, click the **Check Mark** to save your changes. Navigate to the next screen by clicking the **Next** button at the bottom-left of the screen.

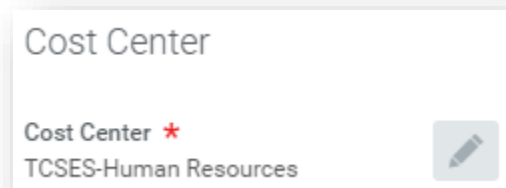
Screen 4: Organizations

The information shown on the **Organizations** screen will auto-fill based on the position selected previously. **If you do not need to edit this information, click **Next** at the bottom-left of the screen.**

If you need to edit the **Company** tied to the position, click the **Pencil** for the **Company** section. Click the **Prompt** button for the **Company** field and select the correct **Company**. Click the **Check Mark** to save your changes.



If you need to edit the **Cost Center** (department) tied to the position, click the **Pencil** icon for the **Cost Center** section. Click the **Prompt** button, type in your department name and hit **Enter** on your keyboard to narrow the results. Select the correct **Cost Center**. Click the **Check Mark** to save your changes.



Navigate to the next screen by clicking the **Next** button at the bottom-left of the screen.

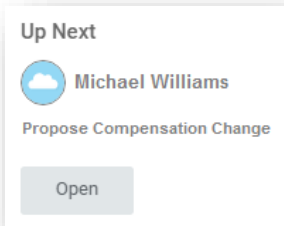
Screen 5: Summary

The **Summary** screen will display all of the information you have entered up to this point. Review the information for accuracy, then click the **Submit** button at the bottom-left of the screen to advance to the next step.

Step 4: Propose and Submit a Compensation Change

Immediately after you click Submit on step 3, a new task will generate called Propose Compensation Change. This task will allow you to set the new pay rate for the employee. You must complete this task before the transfer is complete and can be sent for reviews and approvals.

To start the **Propose Compensation Change** task, click **Open**.



This will display the **Compensation** screen, shown below.

Compensation

Effective Date & Reason

Effective Date

12/11/2016

Use Next Pay Period

Yes

Reason

Promotion > Promotion > Increase in Responsibility

Total Base Pay

Total Base Pay

50,000.00 USD Annual

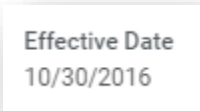
Salary

Add

Hourly

Add

The **Effective Date** field will default to the **Effective Date** selected in Step 3. Do not change this date.



The **Reason** field will auto-fill from the reason selected for the job change. **Do not change this reason.**

Reason
Promotion > Promotion > Increase in Responsibility

Total Base Pay is a read only field that will display the total pay currently assigned to the employee.

Total Base Pay
50,000.00 USD Annual

Next you will see the **Salary** section and the **Hourly** section. Based on the compensation currently assigned to the employee, one of these will already have information displayed.

If the employee is currently assigned a salary compensation, the **Salary** section will have information pre-filled. Click the **Pencil** icon to edit the information in the **Salary** section.

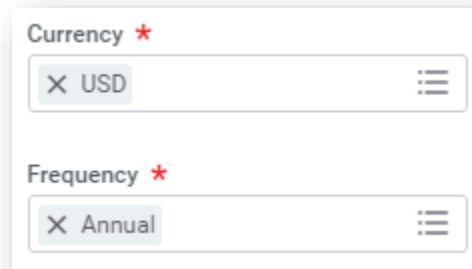
At this point, you can put in the salary increase in one of three different ways. You will see three fields listed; **Amount**, **Amount Change**, and **Percent Change**. If you know the new salary that you want the employee to receive, enter the salary in the **Amount** field (the **Amount Change** and **Percent Change** fields will auto-calculate). If you know the amount of the increase you want the employee to receive, enter that amount in the **Amount Change** field (the **Amount** and **Percent Change** fields will auto-calculate). Finally, if you know the percentage you want the employee's salary to increase by, enter that amount in the **Percent Change** field as a whole number (the **Amount** and **Amount Change** fields will auto-calculate).

Amount *

Amount Change

Percent Change

The **Currency** and **Frequency** fields will be pre-filled. **Do not edit these fields.**



Currency *

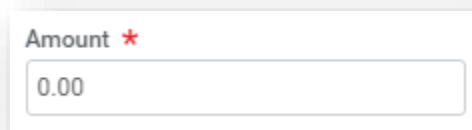
× USD

Frequency *

× Annual

Click the **Check Mark** to save the changes you entered there.

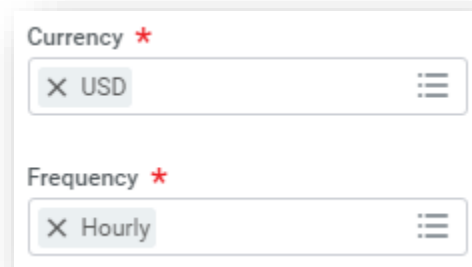
If the, the **Hourly** section will have information pre-filled. Click the **Pencil** icon to edit the information in the **Hourly** section. In the **Amount** field, enter the hourly rate that will be assigned to the position.



Amount *

0.00

The **Currency** and **Frequency** fields will autofill based on the **Job Profile** you chose in Step 3.



Currency *

× USD

Frequency *

× Hourly

Click the **Check Mark** to save the changes you entered there. Once you have entered the necessary information, submit the **Requisition Compensation** by clicking the **Submit** button in the bottom-left of the screen.

Immediately after you click **Submit**, a new task will generate called **Propose Compensation Change**. To start the **Propose Compensation Change** task, click **Open**. **Because you set the**

compensation rate, currency, and frequency when you created the job requisition, you may only need to review these sections. If the employee accepted a different rate of pay for the new job, update the appropriate section.

Review the details you have entered. If any corrections are necessary, click on the appropriate field to make updates. Once you are satisfied that all fields are correct, click **Submit**.

You may also click **Save for Later** if you are not yet ready to submit. Finally, you may click **Cancel** to discard all changes and cancel this action.

You must **Submit** this task before the **Job Change** is complete and can be sent for reviews and approvals.

What happens next

When you click **Submit**, the action will be sent through the review process established for your affiliate. In general, the review process includes:

- Your manager
- Your manager's manager
- Finance Department
- President
- Human Resources

When the action has been approved by Human Resources, the promotion will be finalized and you and the employee will be able to see the new information on the employee's record in Workday.

Checking the status of the action

You can check the status of the action at any time. To do so, go to your **Workday Inbox** and click the **Archive** tab. Select the action that you submitted earlier then click **Process** to review the process history to date. If the action is awaiting anyone's review, you will see it displayed in the **Status** column.