

Quick Reference Guide: *Change Job - Staff, Student & Temporary***Keep in mind**

- The **Change Job** business process supports many tasks including promotion, demotion, transfer, and data changes. This includes transferring a current student worker with a job end date in the past into your supervisory organization when they will be starting a job with your department.
- If the job change is solely to increase or reduce an employee's hours – keeping the pay rate equivalent– the reason of **Change Job: Change Scheduled Weekly Hours** should be used.

If the hours change does not impact benefits eligibility or the employee's *Time Type* (Full Time = 35+hours per week & Part Time = less than 35 hours per week), the position does not need to be edited prior to initiating the **Change Job** process.

If changing an employee from greater than 35 hours per week to less than 35 hours per week or vice versa (without impacting benefits eligibility), the *Time Type* must be changed on the employee's position via the **Edit Position Restrictions** business process prior to initiating the **Change Job** process.

- If the hours increase will make a **benefit ineligible** employee **benefits eligible**, the **Change Job: Promotion** reason must be selected and the employee must be moved in to a different position, which has been assigned the appropriate new job profile, to reflect the promotion. These types of job changes should be the outcome of a competitive search (via UChicago Jobs) and the new attributes (i.e. new job profile) must be reflected in Workday by either creating a new position (**Create Position** business process) or editing an existing position (**Edit Position Restrictions** business process) at the time the UChicago Jobs requisition is posted. When creating or editing the position, the HR Partner should enter the corresponding UChicago Jobs requisition number into the *Job Description Summary* field of the position. For staff positions only, until the new position or the existing position's edits have been approved by the Compensation Administrator, the **Change Job** process cannot be initiated.
- If the employee will be transferring from another organization, navigate to the employee in Workday and use the related action to **Request Transfer**. From here, the reason for the transfer must be accurately reflected (i.e. promotion, demotion, transfer, etc.)
- The **Propose Compensation** step will be a part of the **Change Job** process. The HR Partner must indicate the proposed pay rate by clicking on the **edit icon**  and **NOT** the plus icon (see page 7 for more detail).

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- The specific change and reason along with the details of the change (i.e., job profile, effective date, new pay rate). For staff promotions please include the internal and external data used to determine compensation either in the comments or by uploading documentation to the worker documents section of the worker profile.
- If the change will be reducing the employee's scheduled weekly hours, there will be a prompt to upload the **UChicago Time Accrual Forecast** in the case that the employee must have a portion or all of their balance paid out.
- If the job change will include moving the employee to another position, the position must already exist in an unfilled status prior to proceeding with the **Change Job** business process.

Reasons for job change

Data Change: Change End Employment Date: Change in end date for a fixed term employee.

Data Change: Change in Weekly Hours: An increase or decrease in scheduled weekly hours (FTE change). The business process calls the Propose Compensation sub-process since monthly compensation will usually change.

Data Change: Change Work Location: Change in work location only.

Data Change: Job Profile Update: A job profile change that involves no compensation change.

Data Change: Post Doc: This job change reason should be used for Postdoctoral Researchers who change from a Scholar to a Fellow (or vice versa).

Demotion (Various Reasons): Use when decreasing employee's compensation (other than when reducing weekly hours).

Job Transfer: A transfer to an open position in a new supervisory organization; employee maintains same job profile (transfers do not involve compensation change).

Lateral Move: A move to an open position in the same supervisory organization; employee maintains same job profile (lateral moves do not involve compensation change).

Promotion: Any job profile change that involves a compensation increase.

Quick Reference Guide: *Change Job - Staff, Student & Temporary***Steps:**

1. Search for the Employee's name. From the **Employee's Record**, click on the **Related Actions Icon**  to display the menu of **Available Actions**. Hover over **Job Change** and click on **Transfer**, **Promote** or **Change Job**.



If the employee currently resides in a supervisory organization that is supported by another HR Partner, select the **Request Transfer** option from the **Job Change** related action. The current HR Partner will need to approve the transfer before the **Change Job** process can commence.

2. Click the **Edit Icon**  and use the **Prompt Icon**  to select the answers (if changing) to the following 5 questions:
 - a. When do you want the change to take effect?
 - b. Why are you making the change?
 - c. Who will be the manager after this change?
 - d. Which team will this person be on after this change?
 - e. Where will this person be located after this change?

Start

Start Details

When do you want this change to take effect? *
09/13/2015 

Why are you making this change? *

Who will be the manager after this change?
Viresh Rawal

Which team will this person be on after this change?
PSD Chemistry - Administrative Staff

Where will this person be located after this change? *
Hyde Park Campus



If any of these attributes will not change (for example, if the employee is being promoted within the same supervisory organization), these fields can be reviewed and left unedited.

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3. Click the **Edit Icon**  and use the **Calendar Icon**  to enter the **Effective Date**.
4. Next use the **Prompt Icon**  to select the **Reason** you are making the change and update the rest of the fields, as necessary. When finished, click the **Save Icon** .

Note: *The reason selected here must accurately reflect the situation that is occurring. For example, if there is an increase in compensation paired with a job profile change due to a competitive search or if the employee is becoming benefits eligible, the reason of “promotion” should be used, regardless of whether the individual is being promoted from within your Supervisory Organization.*

5. Click on the **Start Icon**  to begin the change job.
6. On the **Job Tab**, click the **Edit Icon**  in the Position row, and use the **Prompt Icon**  to select the open position the employee will be transferred into.



Remember, an unfilled position must first exist before you can initiate the Change Job process. For positions that are required to be posted on UChicago Jobs, either:

- A new position must have been created with the UC Jobs requisition number indicated in the Job Description Summary, or;
- The UC Jobs requisition number must have been entered in the Job Description Summary of an existing position (via the **Edit Position Restrictions** business process).

Note: *If the “Create New Position” checkbox is selected, a validation rule will appear and prevent submission of the Change Job process.*

7. If you are moving the employee to a new position and would like to close the current position, click the checkbox.



Closing a position is a permanent action. Once closed, a position cannot be re-opened.

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8. If you would like the position to be available for overlap, click the checkbox. Overlap will allow for an incoming employee to be placed in the position prior to the outgoing employee's last day in the position.

9. When finished, click the **Save Icon**  .

10. Click the **Edit Icon**  in the Job Profile and Business Title rows and make changes where necessary. When finished, click the **Save Icon**  .



The screenshot displays a user interface with two main sections: "Job Profile" and "Business Title".

Job Profile

- Job Profile *
Administrative Specialist - AE402B 
- Job Title
Administrative Specialist - AE402B

Business Title

- Business Title
Administrative Specialist - AE402B 

11. Click on the **Next Icon**  to continue.

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12. On the **Location Tab**, click the **Edit Icon**  and use the **Prompt Icon**  to select the new Location, and change the Scheduled Weekly Hours if needed. If the *Work Shift* (shift differential) needs to be modified, click on the **Prompt Icon**  to select either N (for night) or E (for evening). When finished, click the **Save Icon** .

Location

Location Details

Location *
Hyde Park Campus 

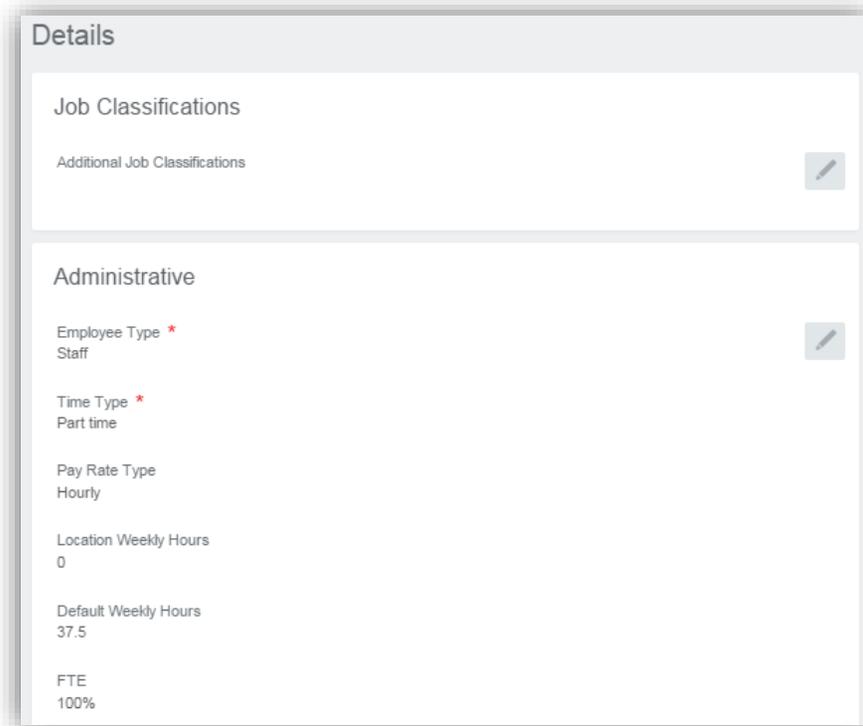
Scheduled Weekly Hours
37.5

Work Shift

13. Click on the **Next Icon**  to continue.

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14. On the **Details Tab**, review the information, and click the **Edit Icon**  to make changes. If moving from a 37.5 hour a week position to a 40 hour a week position (or vice versa), default weekly hours can be changed here. When finished, click the **Save Icon** .



Details

Job Classifications

Additional Job Classifications 

Administrative

Employee Type * 
Staff

Time Type * 
Part time

Pay Rate Type
Hourly

Location Weekly Hours
0

Default Weekly Hours
37.5

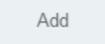
FTE
100%



Time Type and *Location* are attributes that are assigned to the position. If either of these values need to be changed, the position the employee is moving in to will need to reflect these values.

15. Click on the **Next Icon**  to continue.

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16. On the **Attachments Tab**, click the **Add Icon**  to add an attachment. Click the **Attach Icon**  to select your attachment and use the **Prompt Icon**  to select the Document Category (Employee Contract, Benefits, etc.). Attachments are optional here. An offer letter may be uploaded here so that it becomes a part of the employee's *Worker Documents*. When finished, click the **Save Icon** .

17. Click on the **Next Icon**  to continue.

18. On the **Summary Tab**, review all of the change job information and use the **Edit Icon**  to make changes.



If any special instructions or statements are relevant to the proposed job change (i.e., if the department received prior approval from Compensation that the staff promotion did not need to be posted on UChicago Jobs), please indicate accordingly in the comments section.

19. Click on the **Submit Icon**  to submit this task.

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20. The next task will be **Propose Compensation**. Once this task is opened, there will be multiple sections for information. The **Guidelines** section does **not** need to be edited. This section includes **Compensation Package** and **Grade** and will prepopulate based on the **Employee Type**.

Guidelines

Pay Range
8.25 - 45.00 USD Hourly

Guidelines should never be edited

Hourly

Assignment Details
25.00 USD Hourly

Plan Name
Hourly Plan

Effective Date
07/13/2015

~~Add~~

21. Use the **Edit Icon**  to update either the **Salary** or the **Hourly** sections of this screen. Bi-weekly employees should have one Hourly rate entered in the **Hourly** section and monthly employees should have one monthly rate entered in the **Salary** section.

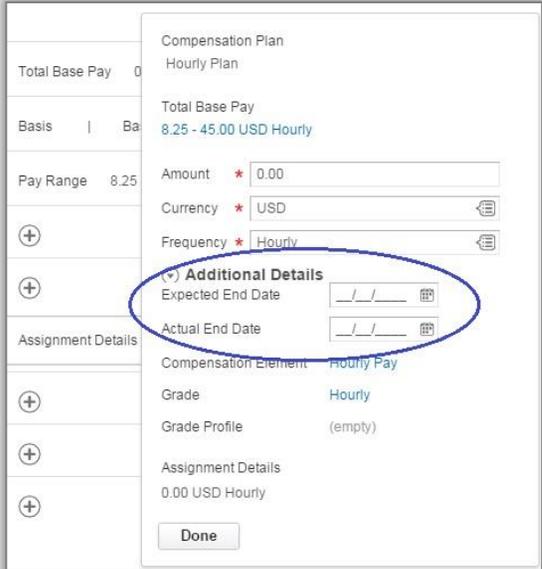
Do **NOT** select the **Add button**  when proposing compensation as part of the **Change Job** process, this will add an additional compensation plan for the employee and will cause overpayment. Within each compensation section, you can enter the **Actual End Date** of the plan amount by clicking on the arrow next to **Additional Details**. Actual End Dates should only be entered for fixed-term employees with a salary plan. Once the plan details are entered, click **Save**.

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 The **Expected End Date** field does not have any impact on ending the compensation plan. The **Actual End Date** must be entered and maintained in order for the compensation to stop paying.

 If the employee will receive either **Period Activity Pay** or a **One-Time Payment** as their compensation, instead of compensation administered within the formal **Compensation Package**, use the **minus icon** within the salary or hourly section to remove the plan row that prepopulates in and click **Submit**.

 If reducing hours, be sure to consider the scheduled weekly hours in your calculation of the new pay rate. *For example, an employee scheduled at 40 **weekly hours**, reducing **weekly hours** to 30, should have their new monthly rate reduced by 25%. \$4,000 per month would become \$3,000 per month. Hourly rates should not be reduced. Monthly compensation does not automatically prorate based on scheduled weekly hours. Monthly compensation must be entered with the actual (prorated) rate upon **Hire**.*



The screenshot shows a configuration window for a compensation plan. The 'Additional Details' section is highlighted with a blue circle. It contains the following fields:

- Expected End Date: [Date field]
- Actual End Date: [Date field]

Other visible fields include:

- Compensation Plan: Hourly Plan
- Total Base Pay: 8.25 - 45.00 USD Hourly
- Amount: 0.00
- Currency: USD
- Frequency: Hourly
- Grade: Hourly
- Grade Profile: (empty)

22. Click on the **Submit Icon**  to submit this task.

23. You will see that this task is routed to the **Budget Partner** for review.

24. The next task will be **Change Organization Assignments**. Review the **HRMS Department Number**, default **FAS Account** and **Sub Account** and **Submit**.

25. The next task will be **Assign Costing Allocations for Change Job**. Indicate appropriate costing allocations at the worker and position level and click the **Add** button. Use the plus icon to add the default FAS account at 100%. If this default account needs to be overwritten, use the plus and minus icons to add more accounts and maintain the percent distribution as necessary. Click **Submit** when done.

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26. A To Do step will appear here that will require the uploading of the UC Time Accruals Forecast if the change job will result in the employee having surplus vacation hours above the new vacation maximum (i.e. if scheduled hours are being reduced)
27. You will receive a message indicating you have successfully submitted the task. 
28. Use the **Arrow Icon**  to review the **Details and Process** information.
29. Click the **Done Icon**  to complete this task.
30. The **Compensation Administrator** will receive the Change Job business process if the Propose Compensation subprocess was triggered by the reason. Upon approval, a notification will be sent to the initiator.
31. If a different position was identified for the job change, the **Assign Pay Group** subprocess will route to the **HR Operations** or **Federal Work Study Administrator** role, so the appropriate pay group can be indicated.
-  In situations where employees become benefits eligible, the Change Benefits Elections task will be sent to the employee. This is also true if earnings increase to the level of *highly-compensated*.