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

Keep in mind

- It is imperative that Change Job reasons are captured appropriately and internal mobility throughout the campus is recorded consistently.
- This process is for a position that has not been posted through Workday Recruiting.
- Reach out to Compensation for advisement for situations not addressed in the guide found on page 4.
- The Change Job business process supports several tasks. See Change Job scenarios on page 4.

Information Needed

Are you hiring an internal candidate selected through the Workday Recruiting? If yes, a Change Job task should have routed to the HRP to complete the process. Do not initiate a Change Job ad hoc, there are negative downstream impacts.

- Employee name
- Supervisory organization
- New Position
- Job Details (i.e. Scheduled Weekly hours)
- Compensation
- FAS account and Sub-account

For student employees, HR Partners should follow the steps below. For staff, temporary or seasonal employees, remember to add the following into the Comments section:

- Compensation
- Organization Assignments
- Costing Allocations
- Choose: Regular Compensation OR Period Activity Pay
  - For Regular Compensation: amount and frequency
  - For Period Activity Pay: total amount, and, activity (if applicable)
- HRMS Department
- Default FAS account and FAS subaccount
- Funding distribution percentages, Start/End dates (if applicable)

The specific change and reason and details of the change.

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 Time Type will change (Full-time/Part-time) for worker as part of the Change Job, you must Edit Position Restrictions prior to processing Change Job so that the new Time Type is available for selection.

To initiate a Change Job for a worker who sits outside of your organization, you must first use Related Actions off of the worker to Request Transfer. From there, you can proceed with the Change Job process.

- The position to which you are transferring the worker must already exist in an Unfilled status before to initiating Change Job business process.

Remember, with the exception of Data Change Reasons, in most cases, an unfilled position must first exist before you can initiate the Change Job process.
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Steps:
1. From the Employee’s Record, click on the Related Actions Icon. Hover over Job Change and click on Transfer, Promote or Change Job. If doing a Change Job on an employee outside your org, the option will read “Transfer Employee”

2. Click the Edit Icon and use the Prompt Icon to answer the following 5 questions:

- When do you want this change to take effect?
- Why are you making this change?
- Who will be the manager after this change?
  - Anne Walters Robertson
- Which team will this person be on after this change?
  - HUM Recruitment
- Where will this person be located after this change?
3. Click the **Edit Icon** and update the date when you want the change to take effect.

4. Under “Why are you making this change?” you **must** indicate a reason, and update the rest of the fields, as necessary.
Below is a table of Change Job Reasons and likely scenarios:

<table>
<thead>
<tr>
<th>Change Job Reason (alpha order)</th>
<th>Additional Details &amp; Sub-Process</th>
<th>Example Scenarios</th>
<th>HR Review &amp; Supporting Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Change: Change in Weekly Hours</td>
<td>• Change in weekly hours that do not affect benefits eligibility.</td>
<td>• Change hours within FT range (20 – 34 hours)</td>
<td>• HR-Operations</td>
</tr>
<tr>
<td></td>
<td>• Proposal Compensation sub-process</td>
<td>• Change hours within FT range (35 – 40 hours)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• If a change in the employee’s weekly hours will affect time status (FT if 35 hours or more/PT if under 35 hours), change Time Type field to reflect appropriate corresponding type.</td>
<td>• Change hours from FT to FT or PT to FT</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Change hours within non-benefit range (0 – 19)</td>
<td></td>
</tr>
<tr>
<td>Data Change: Change Work Location</td>
<td>• Update employee work location</td>
<td>• Employee changes work locations</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• No additional sub-process</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Data Change: Job Profile Update (updated)</td>
<td>• Correct job profile for staff employee.</td>
<td>• Employee hired into misaligned or incorrect job profile; no change in job responsibilities or compensation.</td>
<td>• HR-Compensation and HR-Operations;</td>
</tr>
<tr>
<td></td>
<td>• Note, limited to 6 month maximum timeframe after employee is hired or other change job process occurs</td>
<td></td>
<td>Justification and supporting documentation for job profile correction, may result in posting requirement</td>
</tr>
<tr>
<td>Demote: Employee Choice (new)</td>
<td>• Employee initiated</td>
<td>• Employee requests lower level role</td>
<td>• HR-Compensation and HR-Operations;</td>
</tr>
<tr>
<td></td>
<td>• Propose Compensation sub-process</td>
<td>• Employee changing from Benefits Eligible to Benefits Ineligible.</td>
<td>Justification and supporting documentation for job profile correction, may result in posting requirement</td>
</tr>
<tr>
<td>Demote: Mutual Agreement (updated)</td>
<td>• Employer initiated</td>
<td>• Business need for employee to perform a different role reflective of a lower level of responsibility</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Propose Compensation sub-process</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demote: Poor Performance</td>
<td>• Continued poor performance</td>
<td>• Employee is not meeting performance goals after being on performance improvement plan, both employee and manager mutually agree to decrease responsibility</td>
<td>• HR-Compensation and HR-Operations</td>
</tr>
<tr>
<td></td>
<td>• Propose Compensation sub-process</td>
<td></td>
<td>UChicago Job Requisition to reflect competitive search, base pay references used to inform decision</td>
</tr>
<tr>
<td>Demote: Reorganization</td>
<td>• Large scale unit reorganization</td>
<td>• Large scale unit reorganization results in employee having a different role with a decreased level of responsibility</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Propose Compensation sub-process</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lateral Move: Move to comparable job, no change in compensation (updated)</td>
<td>• In extremely rare cases, may result in compensation change to align with internal equity</td>
<td>• Employee moves from Business Administrator 1 in Unit A to a Business Administrator 2 in Unit B</td>
<td>• HR-Compensation and HR-Operations</td>
</tr>
<tr>
<td></td>
<td>• Propose Compensation sub-process</td>
<td>• Employee moves from Marketing Specialist 1 to Communications Specialist 1</td>
<td></td>
</tr>
<tr>
<td>Promote: Non-Competitive (new)</td>
<td>• Posting exception granted via defined process, as outlined in Talent Acquisition Policy 2022</td>
<td>• Approval at the discretion of both Affirmative Action Officer and Chief Human Resources Officer</td>
<td>• HR-Compensation and HR-Operations</td>
</tr>
<tr>
<td></td>
<td>• Propose Compensation sub-process</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Promote: Promotion</td>
<td>• Propose Compensation sub-process</td>
<td>• Employee moves from individual contributor role to manager role via a competitive selection process</td>
<td>• HR-Compensation and HR-Operations</td>
</tr>
</tbody>
</table>
5. Click on the **Start Icon**

6. Skip the **Job Tab** if you are not initiating one of the following: Demotion, Lateral Move, L743 Reclassification, Promotion. Click the **Edit Icon** in the Position section, and use the **Prompt Icon** to select the open position the employee is being transferred to.

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

7. Click the checkbox if you are moving the employee to a new position and would like to close the current position.

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

8. Click the checkbox if you would like the position to be available for overlap. 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. Click the **Save Icon**

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

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

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

15. 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. Click the Save Icon. Time Type and Location are attributes that are assigned to the position. If either of these values need to be changed, then the position that the employee is moving into will need to reflect these values.

16. Navigate to the Attachments tab when attaching a document as part of the Change Job. Click the Add Icon. Click the Attach Icon to select your attachment and use the Prompt Icon to select the Document Category (Employee Contract, Benefits, etc.). You must select a Document Category. Click the Save Icon. The document will become part of the employee’s Worker Documents.

17. Click on the Next Icon to continue.

18. On the Summary page, 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.), please indicate accordingly in the comments section.

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

20. Depending on the type of Change Job, the next task may be Propose Compensation. Once this task is opened, complete each field based on the instructions documented on the Propose Compensation Quick Reference Guide.
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21. The next task will be Change Organization Assignments. In this section, review the HRMS Department Number, default FAS Account and Sub Account and the Time and Absence Management Handling. Click Submit when done.

22. 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.

23. You will receive a message indicating you have successfully submitted the task.

24. Click the Done Icon to complete this task. Upon approval, a notification will be sent to the intitiator.

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.

Note: Once the Change Job has been submitted, the following steps will be completed by the Shared Services Office. To follow the status of your Change Job, use the Arrow Icon to review the Details and Process information.

Shared Services Office
The Shared Services Office completes sub processes for staff, temporary and seasonal employees.

Keep in Mind
- Not all of the following steps always need to be completed. It depends on the type of Change Job.

Information Needed
- The Change Job business process supports several tasks. See Change Job scenarios on page 4.

25. Depending on the type of Change Job, the next task may be Propose Compensation. Once this task is opened, there will be multiple sections for information. The Propose Compensation Quick Reference Guide provides step-by-step instructions.
26. The next task will be **Change Organization Assignments**. Review the **HRMS Department Number**, default **FAS Account** and **Sub Account** and **Submit**.

27. 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 + and - icons to add more accounts and maintain the percent distribution as necessary. Click **Submit** when done.

28. You will receive a message indicating you have successfully submitted the task.

29. Click the **Done Icon** to complete this task.

Upon approval, a notification will be sent to the initiator.

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*. 