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 “hiring” current student workers.
- Human Resources policy 202 Recruitment and Selection process for staff must be adhered to when conducting a Change Job in Workday.
- Employees that will have a job change on account of a competitive search (via UChicago Jobs) must be moved in to a new position. This position should have already been created or edited in your supervisory organization when the UChicago Jobs requisition was first posted.
- If the employee will be transferring from another organization, the Request Transfer process must first be initiated.

Information Needed

- The specific change and reason
- The details of the change i.e. title, effective date
- 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 a comparable position in a new supervisory organization (transfers do not involve compensation change).

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

Promotion: Any job profile change that involves a compensation increase.
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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 3 questions:
   a. Who will be the manager after this change?
   b. Which team will this person be on after this change?
   c. Where will this person be located after this change?

   If none of these attributes will change (for example, if the employee is being promoted within the same supervisory organization), these fields can be reviewed and left unedited.

3. Click on the Start Icon to begin the change job.
4. Click the **Edit Icon** and use the **Prompt Icon** to select the **Reason** you are making the change.

*Note: The reason selected here must accurately reflect the situation that is occurring. For example, if there is an increase in compensation 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. Use the **Calendar Icon** to enter the **Effective Date**.

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

7. 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.*

8. If you would like to close the current position, click the checkbox.
9. If you would like the position to be available for overlap, click the checkbox.

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

<table>
<thead>
<tr>
<th>Job</th>
<th></th>
<th>Position</th>
<th>Res Assoc (Asst Prof) - Academic 9 Over 12 Pay - 906100</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close the current position?</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is the current position available for overlap?</td>
<td>No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Job Profile</th>
<th></th>
<th>Job Profile</th>
<th>Res Assoc (Asst Prof) - Academic 9 Over 12 Pay - 906100</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Title</td>
<td></td>
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<td>Res Assoc (Asst Prof) - Academic 9 Over 12 Pay - 906100</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Business Title</th>
<th></th>
<th>Business Title</th>
<th>Res Assoc (Asst Prof) - Academic 9 Over 12 Pay - 906100</th>
</tr>
</thead>
</table>

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

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.

<table>
<thead>
<tr>
<th>Location</th>
<th></th>
<th>Location</th>
<th>Hyde Park Campus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location Details</td>
<td></td>
<td>Scheduled Weekly Hours</td>
<td>40</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Work Shift</td>
<td></td>
</tr>
</tbody>
</table>
13. Click on the **Next Icon** to continue.

14. On the **Details Tab**, review the information, and click the **Edit Icon** in the Employee Type or Time Type 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.

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

16. On the **Attachments Tab**, click the **Add Icon** to add an attachment.

17. Click the **Attach Icon** to select your attachment and use the **Prompt Icon** to select the Document Category (Employee Contract, Benefits, etc.).
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Attachments are optional here. An offer letter may be uploaded here so that it becomes a part of the employee’s Worker Documents.

18. Click on the Next Icon to continue.

19. 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.

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

21. A To Do step (reminder) to follow applicable university policy with regards to posting a vacancy (if applicable) will appear. Click Submit.

22. The next task will be Propose Compensation if the following reasons were selected:

   • Promotion
   • Demotion
   • Data Change>Change in Weekly Hours
   • Data Change>Post Doc

23. The next task will be Change Organization Assignments if the following reasons were selected:

   • Promotion
   • Demotion
   • Lateral Move
   • Data Change>Post Doc

24. 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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25. 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).

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

27. Use the Arrow Icon to review the Details and Process information.

28. Click the Done Icon to complete this task.

29. 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.

30. 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.