

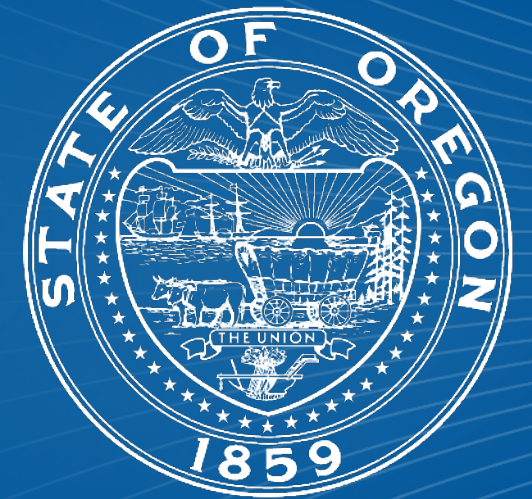
Department of Administrative Services



Workday Foundations

Agenda

1. Introduction
2. Series Overview
3. Job Change
4. Audits and Reporting
5. Close



Introductions



Data Integrity Team

- Ryan Englund
- Libbie Saunders

Workday Foundations



Data Integrity Team Workday Foundations



- Worker Data
- Hire Process
- **Job Change**
- Additional Jobs
- Compensation Change
- Terminations



Prior to starting the Job Change

- Requisition Details
- Check Position & Compensation Data
- Verify Start Date
- Double check for any upcoming or needed comp changes (COLA, merit, allowances, etc)
- PERS Status Check
- Start Job Change

Please keep in mind once you begin this process you will no longer be able to make changes to the prior compensation or position. Please be sure to review history before making a job change.

Job Change



The screenshot shows a web application interface for job changes. On the left, a sidebar contains "My Tasks", "All Items", "Filters", and "Archive". The main area is titled "All Items" and shows a list of items, with one item highlighted: "Change Job: [redacted] Effective: 11/21/2022". To the right, a "Revise Job Change" form is open, showing a "Start" section with "Start Details" and "Employment Agreement". A table with columns "Employee", "Employee ID", "Address", "Phone", "National ID", and "DOB" is visible. A "PERS Status Check" section is also present. A red box highlights a notification icon in the top right corner of the application.

Reminder: For Temporary employees who are changing to a new employee type, select a Lateral reason code. The data will reflect a change in status. Temporary employees moving to another temporary position will update to the union for the new position, however ACA eligibility/designation will need to be looked at.

Job change reasons



- Bidding >
- Classification Change >
- Classification Plan Revision >
- Demotion >
- Lateral >
- Move to New Manager >
- Promotion >
- Reassignment >
- Seasonals >
- Trial Service Removal - Return To Previous Agency & Classification >
- Trial Service Removal - Return to Previous Classification (Same Agency) >

Internal or external?

All temp to LD or Perm are a lateral

Seasonals can use regular job change reasons now

Associated roles – Job change



- HR Partner – Ready for hire, Job change
- Agency Payroll Partner (both sending and receiving) – Adjust time off balances, Assign Work schedule
- Sending manager – Review job change
- Current Manger – Review job change

Review



1. Review will be approved by both the sending manager and receiving manager. They cannot change the information here, but if they see a discrepancy they may 'send back'.
2. The next approval will be that of the HR Partner – the HR Partner should review:
 - Date of hire, location, job class codes, and compensation.
 - Do not use the “X” to remove the current Location, instead use the menu prompt or type in the search field to select the new location. Clicking on the X will remove the job classifications.

Review



Up Next - Sending Agency Payroll Partner

Step 9: The *Sending* Agency Payroll Partner will receive a **Complete TO DO** for the Adjust Time off Balances paying out time off the *Receiving* agency is not approving. Example: The gaining agency will not accept more than the limit of 100 hours of vacation. Refer to the article or click on the link XXX.

Reminder: Once the leaves have been adjusted, submit the To Do.

Success! Event approved

Up Next: Agency Payroll Partner USA | To Do: Adjust Time off Balances

[View Details](#)

UP Next - Receiving Agency Payroll Partner

Step 10: The Receiving Agency Payroll Partner will receive an My Task action to **Assign a Work Schedule for Promotion**. Click on the link [Assign Work Schedule - Job Change](#) for step-by-step instructions.

Reminder: If the employee is transferring to an agency that is using an external Time Tracking system, this step will be skipped.

Success! Event approved

Up Next: Agency Payroll Partner USA | Assign Work Schedule

[View Details](#)

What to do after you have done it all



If you discover a mistake – Things **YOU** can correct

Job Details (Edit Position)

- Employee Type
- Job Profile
- Job Title
- Business Title
- Time Type
- Location
- Scheduled Weekly Hours

Additional Job Classifications (Edit Position)

Required:

- Pay Basis Code
- Timesheet Code
- Overtime Code
- Holiday Code
- PERS Class Plan
- Service Type Code

Optional:

- Job Share
- Concurrent Job Number
- PERS Plan
- Underfill
- Internship

Other

- Comp - Grade Profile, Step, Salary (Request Comp Change)
- Probation Period

- Make sure the effective date of any correction you make is the same as the job change date
- If you get an error with an effective date you are trying to use, send in a help case
- **PLEASE** leave comments with details of what you updated any time you use Edit Position

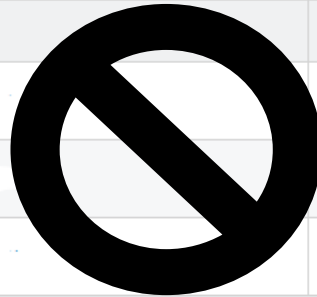
What to do after you have done it all



Correcting a Probation Period

Probation Periods History 3 items

Business Process	Effective Date	Initiated On
Manage Probation Period:	02/16/2022	02/04/2024 03:53:24 PM
Manage Probation Period:	02/16/2022	04/26/2022 02:01:34 PM
Manage Probation Period:	02/16/2022	02/14/2022 09:11:59 AM



Don't use Manage Probation Period

Use Business Process > Correct

A screenshot of a web-based HR system interface. The "View Worker History" page is shown with tabs for "Staffing", "Organization", and "Personal Data". The "Staffing" tab is active, displaying "Hire History" and "Probation Periods History". The "Probation Periods History" section shows a single item for "Karen". A context menu is open over this item, with the "Business Process" option highlighted in red. A sub-menu is also open, showing the "Correct" option highlighted in red. Other options in the sub-menu include "Confirmation View", "Full Process Record", "Test Rule", "View Definition", "View Remaining Process", and "View Security". The "Due Date" is 12/12/20 and the "Effective Date" is 12/11/20.

What to do after you have done it all



If you discover a mistake – Things you need to submit a Workday Help Case for assistance

- **Job Change Date**
 - If we need to correct a job change date for you, do not adjust other service dates first. Once we correct the hire date, we will ask you to review service dates and adjust as needed.
 - Please remind hiring manager that if there is ANY change to a job change to notify HR immediately
- **Job Change Reason**
- **Position** - If job changed to wrong position, we will have to rescind the job change so you can move the employee to the correct position
- **Grade Profile** – AA to AP, etc. (if the hire date is not 1st of the month)
- **Union/Repr**
 - Don't try to remove an incorrect union by using an end date that is the same as the start date
 - Benefit code is directly linked to whatever Union is assigned

If you initiate one of these Business Processes and then remember its not something you can do, please cancel the action and then send in a case. We cannot finish those actions for you.

Questions?

Reports for Job Change Audit



HCM | Employee Internal Job Changes

HCM Employee Job Changes to Other Agencies

Next up.....

Additional Jobs, reclass, primary job swap

