Human Resource Management System

Workday Job Aid
Organization

This Job Aid describes the functionality the HR professional uses to manage the Organization entity within Workday.

- ○ Employees
- ○ People Managers
- ● Human Resources

Contents:

1. Activation

When an inactive organization needs to be activated, the following steps are performed.

Here are the steps to activate an inactive organization:

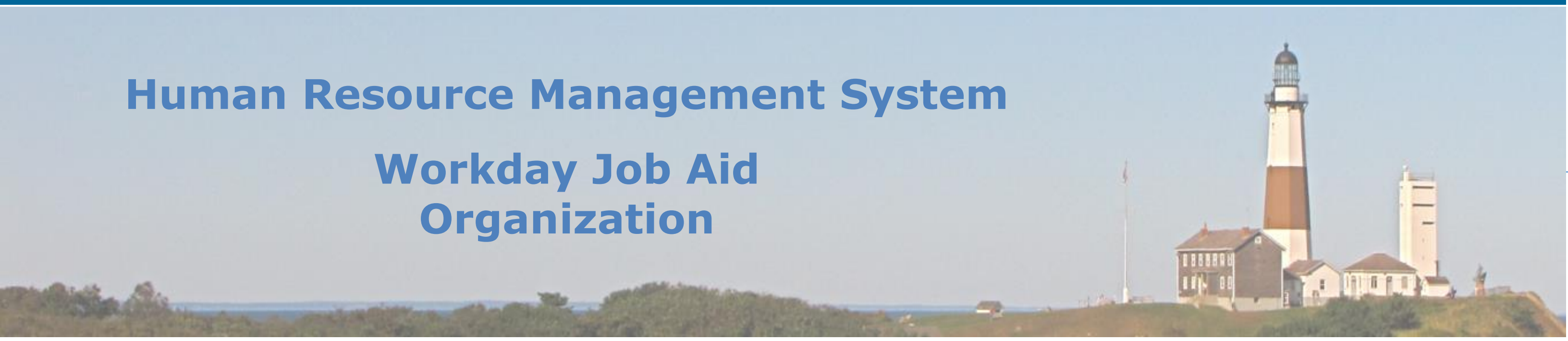
1. Enter the name of the inactive organization in the search bar.
2. Click on the result and bring up the organization.
3. Click on the related **Actions** button
4. Hover over the **Reorganization** menu item and then click on **Activate Organization**.
5. Enter the **Effective Date** if it differs from the date listed.
6. Click **OK**.
7. Click **Submit**.
8. Click **Done**.

2. Assign Superior

To assign a superior organization to an existing supervisory Organization, the following steps are performed.

Note: This task can only be performed by an **HR Administrator**.

1. Enter the name of the supervisory organization in the search bar.
2. Click on the result and bring up the organization.
3. Click on the related **Actions** button
4. Hover over the **Reorganization** menu item and then click on **Assign Superior**.
5. Enter the **Effective Date** if it differs from the date listed.
6. Click **OK**.
7. Select the **Superior Organization** to assign to the selected organization from the **Superior** prompt.
8. Click **Submit**.



3. Create Subordinate

To create a subordinate supervisory organization for an existing supervisory organization, the following steps are performed.

Note: This task can only be performed by an **HR Administrator**.

1. Enter the name of the supervisory organization in the search bar.
2. Click on the result and bring up the organization.
3. Click on the related **Actions** button
4. Hover over the **Reorganization** menu item and then click on **Create Subordinate** or **Divide Organization**.
5. Enter the **Effective Date** if it differs from the date listed.
6. Click **OK**.
7. Fill out the form as needed (* denotes a required field).
8. Click **Submit**.

Note: Once submitted, this task will be routed to the Organization Manager for approval.

4. Divide Organization

To split an existing supervisory organization into multiple organizations, the **Divide Organization** function is used.

Note: This task can only be performed by an **HR Administrator**.

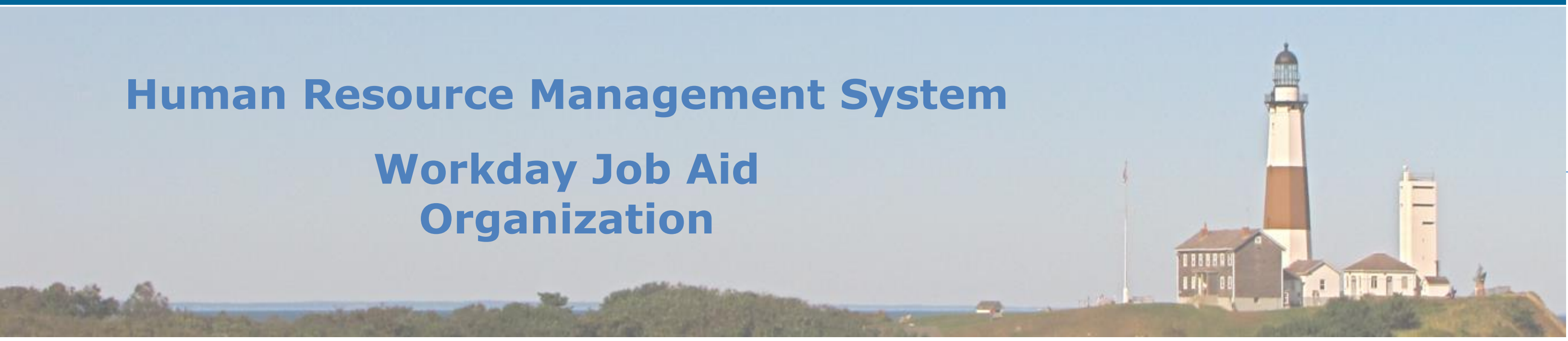
Here are the steps to divide an existing organization:

1. Enter the name of the supervisory organization in the search bar.
2. Click on the result and bring up the organization.
3. Click on the related **Actions** button
4. Hover over the **Reorganization** menu item and then click on **Divide Organization**.
5. Enter the **Effective Date** if it differs from the date listed.
6. Click **OK**.

Note: The effective date should be the earliest date that transactions will be completed in the organization.

7. Fill out the form as needed (* denotes a required field).
8. Click **Submit**.

Note: Once submitted, this task will be routed to the Organization Manager for approval.



5. Assign a New Manager to a Supervisory Organization

There are times when the ownership of a Supervisory Organization changes. This will oftentimes occur as a result of a promotion or a newly elected official. When this happens the name of the Supervisory Org must change as the manager's name resides in the title of the Supervisory Org. In addition to changing the title of the Supervisory Org, the Organization ID for that Supervisory Org needs to change and reflect the manager name listed in the Supervisory Org.

Note: The **Assign Roles** task can only be performed by a person with the **Security Admin** role.

Note: The **Edit Reference ID** task can only be performed by a person with the **HR Admin** role.

Here are the steps required to perform the **Assign Roles** task:

1. Look up the Sup Org that needs to be changed by searching for it and then selecting it from the search.
2. Click on the Twinkie next to the Sup Org name.
3. Hover over the **Roles** menu item and click on the **Assign Roles** task.
4. Enter the **Effective Date** of when the manager changed for the Sup Org.
5. Click the **OK** button.
6. In the **Assign Roles** grid find the row with the role of "manager" set and the click minus symbol to remove the previous manager role.
7. Click the plus symbol to add a row.
8. Select the role of **Manager**.
9. Enter the new manager's name in the **Assigned To** field.
10. Click the **OK** button.

Here are the steps required to perform the **Edit Reference ID** task:

1. Look up the Sup Org that needs to be changed by searching for it and then selecting it from the search.
2. Click on the Twinkie  next to the Sup Org name.
3. Hover over the **Integration IDs** menu item and click on the **Edit Reference ID** task.
4. In the **Reference ID** field enter the new manager's name so that it matches the name listed in the parenthesis of the Supervisory Organization in question.

   Note: The name must be entered in ALL capital letters.

   Note: An underscore is to be used in place of a space between the first and last names (e.g. John_Smith).
5. Click the **OK** button.
6. Click the **Done** button.

   Note: The updated **Reference ID** will now display next to the **Organization ID** label on the screen.

6. Assign Organizational Assignment

There are times when changes need to be made at the supervisory organization level that trickle down to some or all of the employees that sit under that organization.

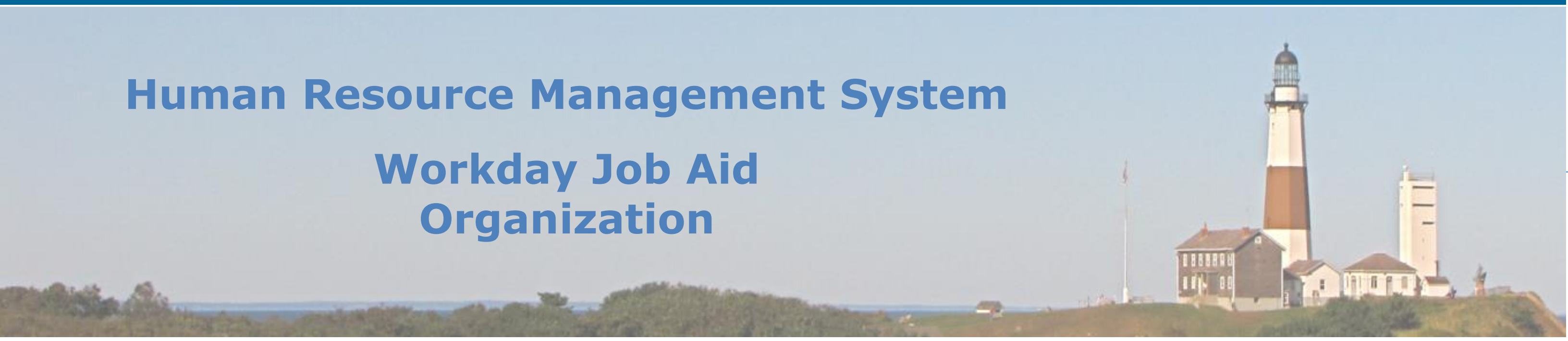
Here are the steps required to perform the **Assign Organizational Assignment** task in Workday:

1. In the Workday Search bar enter “cha org ass”.
2. Click on the **Assign Organizational Assignment** task in the results returned.
3. Enter the **Effective Date** of the change.
4. Select the **Supervisory Org** from the list provided.
5. Click **OK**.
6. Fill in the appropriate fields (* indicates a required field).
7. Click **Submit**.
8. Click **Done**.

7. Change Organization Assignments for Worker

To change supervisory organization information for a specific employee, follow these steps:

1. Enter the name of the employee in the search bar.
2. Click on the result and bring up the employee.
3. Click on the related **Actions** button
4. Hover over the **Organization** menu item and then click on **Change Organization Assignments**.
5. Enter the **Effective Date** if it differs from the date listed.
6. Click **OK**.
7. Update the different sections as needed (* denotes a required field).
8. Click **Submit**.



8. Change Organization Assignments for Worker by Organization

To change supervisory organization information for a group of employees the changes are made at the supervisory organization level.

Here are the steps required to complete this task:

1. Enter the name of the supervisory organization in the search bar.
2. Click on the result and bring up the organization.
3. Click on the related **Actions** button
4. Hover over the **Organization** menu item and then click on **Change Organization Assignments**.
5. Enter the **Effective Date** if it differs from the date listed.
6. Click **OK**.
7. Update the items in the Override Organization Assignments as needed.
8. From the list at the bottom of the page select the employees whom these changes are to be applied.
9. Click **Submit**.

9. Assign Matrix Organization

To assign a worker to a matrix organization, follow these steps.

1. Enter the name of the employee in the search bar.
2. Click on the result and bring up the employee.
3. Click on the related **Actions** button
4. Hover over the **Organization** menu item and then click on **Assign Matrix Organization**.
5. Enter the **Effective Date**.
6. Select the worker.
7. Click **OK**.
8. Select the **Matrix Organization** from the list provided.
9. Click **Submit**.

10. Remove From Matrix Organization

To remove an employee from a matrix organization, follow these steps:

1. In the Workday Search bar enter "rem mat mem".
2. Click on the **Remove Matrix Member** task in the results returned.
3. Enter the **Effective Date** of the change.

Note: When possible, make the beginning of a pay period the effect date to remove a member from a matrix.

4. Select the **Matrix Organization** to remove the employee from.
5. Click **OK**.
6. Select the worker that is being removed from the matrix.

Note: The **Position** field will auto-populate based on the worker selected.

7. Click **Submit**.

11. Promote Worker

There are times when a worker is promoted to a new role. When that situation, arises the promotion needs to be reflected in Workday.

Here are the steps to promote an employee:

1. Enter the name of the employee in the search bar.
2. Click on the result and bring up the employee.
3. Click on the related **Actions** button
4. Hover over the **Job Change** menu item and then click on **Transfer, Promote or Change Job**.
5. On the Start page:
    a. Enter the date the promotion is to take effect.
    b. Select Promotion for why you are making this change.
    c. Click **Start**.
6. Work your way through the remaining sections updating all appropriate information (* indicates a required field).
7. Review information on the Summary page.
8. Click **Submit**.

Note: This will require the approval of the manager's manager, followed by the HR Partner.

12. Change Job (Same Union)

There are times when an employee seeks to change their current job. Either they wish to move to a different position on their current team, or perhaps seek to change the location of where they do their job. In either case, the **Change Job** task is used to make the necessary adjustments to an employee's record within Workday.

To change the job for a specific employee follow these steps.

1. Enter the name of the employee in the search bar.
2. Click on the result and bring up the employee.
3. Click on the related **Actions** button
4. Hover over the **Job Change** menu item and then click on **Transfer, Promote or Change Job**.

   Note: This will take you to the **Start** page of the Change Job process.
5. Enter the date the change is to take effect.

   Note: It defaults to the start of the next payroll period.
6. Select the reason why you are making this change.
7. Review the information defaulted in for the manager, team, and location information.
8. **Note**: This information defaults to the current manager, supervisory organization, and location of the employee. If the employee is moving to a different department this information will more than likely need to change.

   Note: The manager associated with the Supervisory Organization (team) will also be the manager listed in the manager field.
9. Update the location of where the person will be located after the change.

   Note: When "Change Location" has been selected as the Job Change Reason only the Location information can be changed. Any other changes will result in the generation of an error.

   Note: When "P Class" has been selected as the Job Change Reason only the P Class information can be changed. Any other changes will result in the generation of an error. A P Class change occurs when an employee reaches their one year anniversary with the County and their hours shift from 37.5 to 35 weekly.
10. Click the **Start** button.

11. On the next page (**Move**), do not make any updates in the Open section.
12. Click on the **Next** button.

    Note: The next page is the **Job** page. Here you can update information about the Position, Job Profile, and Business Title. Depending on the intended change, any or all of these sections can be updated.

    Note: If the **Position** field is empty or it is changing, you will need to update this field.

    Note: Select the **Position** from the list provided.

    Important: NEVER create a new position from this page. The Budget office is the only place where positions are created.

    Note: Once the **Position** is selected, the associated **Job Profile** and **Business Title** information is automatically filled in.
13. Click the **Next** button.

    Note: This will take you to the **Location** page where you will find the Location details information already filled in. This too is filled in based on the **Position** selected.

    Note: Confirm that the weekly hour total is correct. If it is not you can change it here.

    Click on the **Next** button.

    Note: This will take you to the **Details** section of the process.

    Note: Do not change the **Additional Job Classifications** item in the **Job Classification** section.
14. Review the **Administrative** section and make any necessary updates.

    Note: Make sure that the **FTE** is set to 100%. If it is not, then changes will need to be made to get that value back to 100%. This most likely is caused by the value of the **Default Weekly Hours**.

    Note: There are no other fields that the Payroll Representative needs to update on this page.
15. Click the **Next** button.

    Note: We are now on the **Attachments** page.

    Note: If there are any job change related documents they can be added to this page.
16. Click the **Next** button.

Note: This will now take you to the **Summary** page. This is your opportunity to review all of the information that was listed on the previous pages. If anything needs to be updated click on the pencil icon in that specific section and it will allow you to make an update.

Note: Any item with a blue dot next to it is what was added and anything with a red "x" next to it was removed as a result of this Job Change Business Process.

17. Once all information looks good click the **Submit** button.

    Note: At this point, you will be returned to the employee's **Profile** page. There will also be a popup window with a blue **Open** button.

18. Click the **Open** button.

    Note: This will take us to the **Change Organizational Assignment** page.

19. Scroll down to the **Organizations** section and confirm that the **Company** and **Cost Center** fields are filled correctly.
20. In the **Other** section, the Payroll Representative must fill in the **Unit**, **Appropriation**, and **Fund** values.
21. Enter a detailed **Comment** explaining what is taking place. This comment will be read by the approvers of this business process and could help speed up the approval process.
22. Click the **Submit** button.

    Note: At this point, you will be returned to the employee's **Profile** page. There will also be a popup window with a blue **Open** button.

23. Click the **Open** button.

    Note: This will take us to the **Assign Collective Agreement** page.

    Note: The **Collective Agreement** will already be filled in based on the previous information entered.

24. Click the **Submit** button.

    Note: At this point, you will be returned to the employee's **Profile** page. There will also be a popup window with a blue **To Do** button.

    Note: This is an optional task and is only needed if the employee changed unions as a result of this job change.

25. Click the **To Do** button.
26. Enter a **Comment** explaining that the employee will be staying with the same union.

Note: There is a separate Job Aid lesson that focuses on a Job Change that involves the change in Unions. Click here to go to that lesson.

27. Click the **Submit** button.

    Note: At this point, you will be returned to the employee's **Profile** page. A popup window with a blue **Open** button will display.

28. Click the **Open** button.

    Note: This will take us to the **Propose Compensation Change** page.

    Note: As you scroll down the page you will find the information already filled in. This was done based on the **Position** and Job **Profile** selected.

    Note: Any changes that need to be made (E.g. Different Step assignments) are to be made at this point.

29. Click the **Submit** button.

    Note: At this point, you will be returned to the employee's **Profile** page. There will also be a popup window with a blue **To Do** button.

    Note: This is to update the **Employee Roster** custom object.

30. Click the **To Do** button.
31. Follow the instructions presented on the next page (Update Roster History custom object).
32. Go to the employee's **Profile** page.
33. Click on the **Job** menu item in blue on the left side of the page.
34. Then click the **More** tab and select the **Additional Data** menu item.
35. Scroll down the page to the **Roster History** section.
36. Click the **Edit** button just after the **Roster History** grid.
37. On the next page click on the plus sign at the top of the grid to insert a blank row.
38. Fill in the required information on that row.
39. Click on the **OK** button.
40. The Payroll Representative will now go into their Workday Inbox and click the **Submit** button on the **Roster History To Do** task.

    Note: This will flag that the **To Do** has been completed.

Note: At this point, approvals must be obtained from the four main governing bodies relative to a job change. They are Audit & Control, Budgeting, Civil Service, and Labor Relations. Each group has an Inbox item that they must address.

Note: Once all approvals have been received the Payroll Representative will find a **Manage Union Membership** task in their Workday Inbox.

41. Go into your Workday Inbox and click on the **Manage Union Membership** task. To the right, the details of that task will display.
42. Select the **Worker's Current Unions** and then select the union that displays.
43. Click the **OK** button.
44. **Important:** Remember in this scenario, the employee changing jobs is NOT changing unions. If you encounter that situation you need to follow the instructions for the job aid lesson dealing with Job Change across Unions.
45. Select the new position in the **Related Position** field.
46. Enter "No Change to Union Membership" in the **Comment** field.
47. Click the **Submit** button.

    Note: A "Success! Event submitted" popup will display. In it, you will see an Open and a skip button. These buttons relate to assigning a probationary period with this job change.
48. If there is no probationary period, click the **Skip** button.
49. If there is, click the **Open** button.
50. Fill in the **Probation End Date**.

    Note: This will calculate the **Probation Duration** and automatically fill it in.
51. Click the **Submit** button.

    Note: You will then be presented with a popup window with a "Success! Event submitted". On that popup, you will see a blue **To Do** button.
52. Click the **To Do** button.

    Note: This will take you to a page where you can freeze the position (if needed). A position is frozen if it is not being backfilled.
53. Click the **Manage Position Freeze** button if the position is to be frozen.
54. On the next screen select the position to be Frozen from the **Position** list.
55. Then enter the **Freeze Date**.

56. Click the **Frozen** Checkbox.
57. Click the **Submit** button.
58. Back on the **Complete To Do** page enter a **Comment** explaining what action was taken.
59. Click the **Submit** button to complete the To Do.

    Note: At this point, Civil Service needs to Clear Ear Mark Budget Conformance on Position Restrictions. This will show up as a **To Do** in their Workday Inbox. Once they complete this task the Payroll Representative will receive an **Onboarding Setup for Data Change** task in their Workday Inbox.

60. Fill in the **Onboarding Setup** page as needed and click the **Submit** button.

    Note: This will cause a popup to display with a blue **Open** button.

61. Click the **Open** button.

    Note: This will take you to the **Manage Business Processes for Worker** page. This is where any items that the employee left unresolved in their previous position are dealt with.

62. Update the page as needed.
63. Click the **Submit** button.
64. At this point, a task(**Review Time Off Requests: Data Change**) is sent to the manager (via the Workday Inbox) to review any time off request(s) for this employee that needs to be dealt with because of the job change.

    Note: At this point, the PR will review their Workday Inbox to confirm that there are no tasks remaining to be processed for this employee. If there is the Payroll Representative will complete those tasks.

    Note: A final check of the employee's Job Change is performed by the Payroll Representative.

65. Go to the Employee's **Profile** page.
66. Click on the **Job** menu item listed on the left side of the screen.
67. Then click on the **More** tab to the right and then click on the **Worker History** menu item.
68. On the next page review the **Worker History** grid to see if there is anything that needs to be completed.
69. For a different view click on the **View Worker History by Category** button.
70. Review each of these sections to see if any tasks are left to be completed.

71. To see a list of the tasks completed for the **Job Change** click on the business process item listed in the **Position Change History** grid.
72. On the next page click on the **Process** menu tab.

    Note: This will show you all the steps that are part of the **Job Change** Business Process. It will also show you the status of each step, along with when it was completed and by whom.

At this point, the job change process has been completed for the employee.

13. Change Job (Move to Different Union)

There are times when an employee seeks to change their current job. That change may result in them leaving their department or even their Union. The steps involved in this job change are more complex than that of a standard job change in that it requires the coordination of multiple Payroll Representatives: The one for the current department and the one for the department the employee is moving to. In this lesson, we will refer to them as Source and Target Payroll Representatives respectively. The **Change Job** task is used to make the necessary adjustments to an employee's record within Workday.

Note: The **Source Payroll Representative** performs this first set of tasks to start the Job Change business process.

To change the job for a specific employee follow these steps.

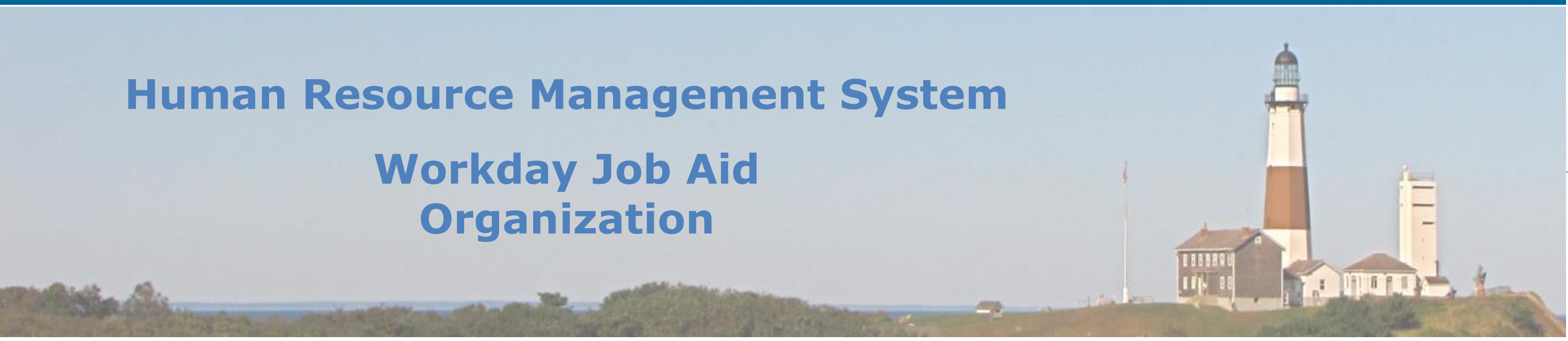
1. Enter the name of the employee in the search bar.
2. Click on the result and bring up the employee.
3. Click on the related **Actions** button
4. Hover over the **Job Change** menu item and then click on **Transfer, Promote or Change Job**.

   Note: This will take you to the **Start** page of the Change Job process.
5. Enter the date the change is to take effect.

   Note: It defaults to the start of the next payroll period.
6. Select the reason why you are making this change.
7. Now select the manager of the area the employee is moving into.
8. Then select the team (supervisory org) that the employee is joining.

   Note: The manager associated with the Supervisory Organization (team) will also be the manager listed in the manager field.

   Note: This information defaults to the current manager, supervisory organization, and location of the employee. If the employee is moving to a different department this information will more than likely need to change.
9. Update the location of where the person will be located after the change.



Note: When "Change Location" has been selected as the Job Change Reason only the Location information can be changed. Any other changes will result in the generation of an error.

Note: When "P Class" has been selected as the Job Change Reason only the P Class information can be changed. Any other changes will result in the generation of an error. A P Class change occurs when an employee reaches their one year anniversary with the County and their hours shift from 37.5 to 35 weekly.

10. Click the Start button.
11. Review the information on the next page and click the **Next** button.

    Note: If there are any pertinent documents they can be added to the Attachment page.

12. Click the **Next** button on the Job page at this time.

    Note: The information on this page will be updated later in the process by the **Target Payroll Representative**.

13. Click the **Next** button to advance to the **Location** page.

    Note: Again, this information will be updated later in the process by the **Target Payroll Representative**.

14. Click the Next button to advance to the **Details** page.

    Note: Again, this information will be updated later in the process by the **Target Payroll Representative**.

15. Click the Next button to advance to the **Attachments** page.

    Note: If any documents support this job change they can be uploaded here and attached to this business process.

16. Click the **Next** button to advance to the **Summary** page.

    Note: This will allow you the opportunity to review what has been entered up to this point.

17. You will now be on the **Summary** page. Review the information presented, making changes if needed.
18. Click the **Submit** button to continue the Job Change process.

Note: The **Target Payroll Representative** performs the next set of tasks for the Job Change business process.

Note: At this point, the HR Partner for the department the employee is moving into will receive a task (Data Change) in their Workday Inbox.

19. They will review the details of the task while scrolling down to the **Position** section.
20. There they will edit that section and select the **Position** in their department that the employee is moving into.
21. Once selected, the checkmark is clicked to save the **Position** change.

    Note: This will cause the **Job Profile**, **Business Title**, and **Location** Details information to be populated (based on the selected position).
22. Once the remaining information is confirmed accurate the **Approve** button is clicked.

    Note: A popup will then display stating "Success! Event approved".
23. Click on the **Open** button on that popup.

    Note: This will take you to the **Change Organization Assignments** page.
24. On this page confirm that the **Company** and **Cost Center** listed are correct in that they apply to the new position.

    Note: If the **Fund** and **Appropriation** information is at this time they can add it here.
25. Click the **Submit** button.
26. **Note:** A popup will then display stating "Success! Event approved".
27. Click on the **Open** button on that popup.

    Note: This will take you to the **Assign Collective Agreement** page.
28. On this page change the **Collective Agreement** (If Necessary) to reflect the new position they are being moved into.
29. Click the **Submit** button.

    Note: A popup will then display stating "Success! Event approved".

    Note: If the employee is changing unions as a result of the job change, they need to be removed from their prior union and added to their new one. All of this is based on the position they held previously and the one they are moving into.

30. Click on the **View Details** link on that popup.
31. Now click on the **Done** button to signify that you have taken care of any union reassignments (if needed).

Note: The **Source Payroll Representative** performs the next set of tasks for the Job Change business process.

Note: The Payroll Representative of the department the employee is leaving will receive a task for them to "End Previous Union Membership" (If that situation applies).

32. The Payroll Representative will click on the **Manage Union Membership** button.
33. On the next page, the Payroll Representative will enter the **employee's name** and the **Worker's Current Union**.
34. Click **OK**
35. On the **Manage Union Membership** page, in the Membership Information grid, fill in the **End Date**.

    Note: This will be the day before the employee starts their new position.

36. Click the **Submit** button.
37. Once you are returned to the WorkDay Inbox, click the **Submit** button to complete that task.

Note: The **Source Payroll Representative** performs the next set of tasks for the Job Change business process.

Note: At this point, the Payroll Representative of the department the employee is moving into needs to set up **Compensation** for this position. They will receive a task in their WorkDay Inbox regarding this matter (**Compensation Change**).

38. The Payroll Representative will review the information listed in the task and make the necessary changes (if needed).
39. A **Comment** explaining what was updated is expected to be entered. These comments will be reviewed by the approvers of this change. (Audits, Civil, Labor, and Budgets).
40. Once the information is deemed accurate the Payroll Representative will click the **Submit** button.

Note: At this point, approval requests will land in the WorkDay Inboxes of the four approval areas (Civil, Audits, Labor, and Budgets). The change job process will wait at this point until approvals are received from those four areas.

Note: If any of the approvers have questions regarding the job change, they can send the request back, along with their questions so that they can be addressed.

Note: Once the four approvals are logged in WorkDay the Payroll Representative for the department where the employee is moving will be tasked with assigning the employee to their new Union.

41. The Payroll Representative of the new department goes to their WorkDay Inbox and clicks on the "Manage Union Membership for Worker" task.
42. In the details section (**Union** field) they select the union the employee is now to become a member of.
43. Click the **OK** button.
44. On the next page enter the date the employee started the new position in the **Union Seniority Date** field.
45. Under the **Membership Information** section enter the date the employee started the new position in the **Start Date** field.
46. Now select the **Type** of membership from the list provided.
47. In the **Related Position** field, select the position listed.
48. Click the **Submit** button.

    Note: A popup will then display stating "Success! Event approved".
49. Click on the **Open** button on that popup.

    Note: This will take you to the **Add Probation Period** page.
50. On this page fill in all the information that is appropriate.

    Note: Fields flagged with a red asterisk (*) are mandatory fields.
51. Click the **Submit** button.

Note: The **Target Payroll Representative** performs the next set of tasks for the Job Change business process.

Note: At this point, the Payroll Representative of the department the employee is moving into needs to set up **Compensation** for this position. They will receive a task in their WorkDay Inbox regarding this matter (**Compensation Change**).

52. The Payroll Representative will review the information listed in the task and make any necessary changes (if needed).
53. A **Comment** explaining what was updated is expected to be entered. These comments will be reviewed by the approvers of this change. (Audits, Civil, Labor, and Budgets).
54. Once the information is deemed accurate the Payroll Representative will click the **Submit** button.

Note: Approval requests will land in the WorkDay Inboxes of the four approval areas (Civil, Audits, Labor, and Budgets). The change job process will wait at this point until approvals are received from those four areas.

Note: If any of the approvers have questions regarding the job change, they can send the request back, along with their questions so that they can be addressed.

Note: Once the four approvals are logged into WorkDay the Payroll Representative for the department where the employee is moving to will be tasked with assigning the employee to their new **Union**.

55. The Payroll Representative of the new department goes to their WorkDay Inbox and clicks on the "Manage Union Membership for Worker" task.
56. In the details section (**Union** field) they select the union the employee is to become a member of.
57. Click the **OK** button.
58. On the next page enter the date the employee started the new position in the **Union Seniority Date** field.
59. Under the Membership Information section enter the date the employee started the new position in the **Start Date** field.
60. Then select the Type of membership from the list provided.
61. In the **Related Position** field select the position listed.
62. Click the **Submit** button.

Note: A popup will then display stating "Success! Event approved".

63. Click on the **Open** button on that popup.

    Note: This will take you to the **Add Probation Period** page.

64. On this page fill in the information that is appropriate.
65. Click the **Submit** button.

Note: The **Source Payroll Representative** performs the next set of tasks for the Job Change business process.

Note: The Payroll Representative from the previous department will receive a task in their WorkDay Inbox labeled "Freeze Position".

66. If the position the employee is leaving is not being refilled at this time, the Payroll Representative will:
    a. Click on the **Manage Position Freeze** button.
    b. Process the associated page(s).
    c. Click the **Submit** button.
67. . If the position does not need to be frozen, click on the **Submit** button.

Note: The **Target Payroll Representative** performs the next set of tasks for the Job Change business process.

Note: The Payroll Representative of the department the employee is moving into needs to update the employee's **Roster History**. They will receive a task in their WorkDay Inbox regarding this matter (**Update the Employee's Roster History**).

68. Go to the employee's profile page.
69. Click on **Job** on the left side menu.
70. Click on the **More** tab and then the **Additional Data** menu item.
71. Scroll down to the **Roster History** section.

72. Click the **Edit** button just under the **Roster History** grid.
73. Click the plus sign at the top of the grid to insert a new row.
74. Fill in the required information on the new row.
75. Click the **OK** button.
76. Click the **Done** button.
77. The Payroll Representative will now return to their WorkDay Inbox.
78. Click the **Submit** button on the "Update the Employee's Roster History" task to signify that it was completed.

    Note: The Security Administrator will then review the employee's access (**Review User-Based Security Group Assignments**) to see if changes need to be made in that area as a result of them leaving one role and starting a new role.

79. After any required security updates have been made the Security Administrator will click the **Submit** button on the task listed in their Workday Inbox to signify that it has been completed.
80. Now the Payroll Representative will review the remaining tasks in their Workday Inbox that pertain to the Job Change business process for the employee. These include:
    a. Review Accruals
    b. Update Service Dates (if necessary)
    c. Update Position Details - Remove this (For Civil Service and Budget ONLY)
    d. Tasks that were assigned to the employee in their previous role that was not completed. (Manage Business Processes for Worker). (E.g. Time Off requests from Subordinates).

       Note: Reassign these tasks to the Payroll Representative of the previous department.

    e. Assign a Pay Group
    f. Assign a Work Schedule

       Important: Remember to click the **Submit** button for each task listed in the Inbox after it has been completed. This will signify to Workday that the task was completed.

Note: The **Manager of the target department** performs the next set of tasks for the Job Change business process.

81. The target manager will receive a task to review the employee's outstanding time-off requests to confirm that there are no issues with them now that the employee is part of a new team.

    Important: The **Submit** button needs to be clicked on that task in the manager's Workday Inbox to signify that it was completed.

Note: The **Target Payroll Representative** performs the next set of tasks to complete the Job Change business process.

82. As a final check, the Payroll Representative for the new department will go to the employee's Workday Profile page.
83. There they will click on the **Job** menu item on the left and then click on the **Worker History** tab at the top of the page.
84. They will scroll through the page and confirm that all business processes tasks related to the job change have their status set to "Successfully Completed".
85. A further check can be performed by clicking on the **View Worker History by Category** button and reviewing all of the recent business process tasks that are related to the job change. They should all be set to "Successfully Completed".

    Note: This also gives a comprehensive view of all of the tasks that had to be completed for this job change to be processed.

At this point, the job change process has been completed for the employee.

14. Transfer Worker

Situations may arise in which an employee will need to report to a different manager while serving in the same role. The **Transfer Worker** task is used to make the necessary adjustments to the employee's record within Workday to reflect the transfer.

To transfer a specific employee follow these steps.

1. Enter the name of the employee in the search bar.
2. Click on the result and bring up the employee.
3. Click on the related **Actions** button
4. Hover over the **Job Change** menu item and then click on **Transfer, Promote or Change Job**.
5. On the Start page:
    a. Enter the date the change is to take effect.
    b. Select the reason why you are making this change.
        i. Transfer=>Move to Another Manager
    c. Click **Start**.
6. Work your way through the remaining sections updating all appropriate information (* indicates a required field).
7. Review information on the Summary page.
8. Click **Submit**.

Note: This will require the approval of the manager's manager, followed by the HR Partner.

15. Add Additional Job

There may be times when an employee will split their time between multiple jobs here at the County. Each of those jobs must be assigned to the employee in Workday. To accomplish this we must use the **Add Job** task.

Here are the steps to perform to add an additional job to an employee:

1. Enter the name of the employee in the search bar.
2. Click on the result and bring up the employee.
3. Click on the related **Actions** button
4. Hover over the **Job Change** menu item and then click on **Add Job**.
5. Confirm the correct Sup Org and Employee display.
6. Click **OK**.
7. Fill in all appropriate information (* indicates a required field).
8. Click **Submit**.
9. Click **Done**.

Note: This will require the approval of the manager's manager, followed by the HR Partner.

16. Change Visibility

Warning: Modifications using this feature could have major ramifications for the County Structure within Workday. Extreme caution should be taken when using this feature as it could cause loss of access to various Supervisory Organizations. It is recommended that before updating with this feature the target Supervisory Organization should be first removed from the overall organization structure.

Note: This task can only be performed by an **HR Administrator**.

To Change Visibility for a specific Supervisory Organization, follow these steps.

1. Enter “org sum” in the search bar.
2. Click on the **Organization Summary** report.
3. Filter the **Organization Type** Column to list only “Supervisory”.
4. Find the Organization to modify in the list provided and click on the three-dot icon next to the name. The **Actions** menu will appear.
5. Hover over the **Organization** menu item and then click on the **Change Visibility** sub menu item.
6. Review the **Current Organization Visibility** assignment.
7. Select the **Proposed Organization Visibility** from the list provided.
8. Enter an optional comment.
9. Click **Submit**.

Change Log				
Revision Number	**Date of Change**	**Affected Lesson**	**Action**	**Initials**
1.1.1.1	09/15/2021		Log Created	RK
1.1.1.2	01/31/2022	Assign a New Manager to a Supervisory Organization	Added Lesson	RK
1.1.1.3	03/22/2022	Change Job	Added note about Change Location BP implication.	RK