
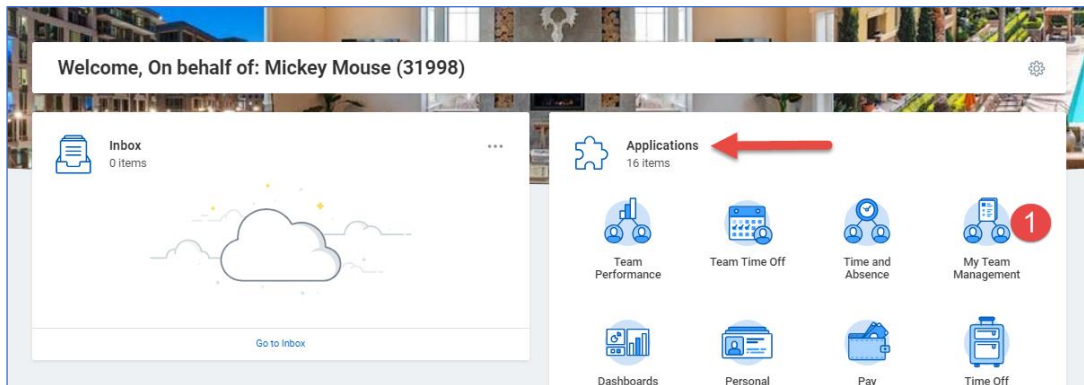


## Workday Job Aid – Transfer, Promote, or Change Job

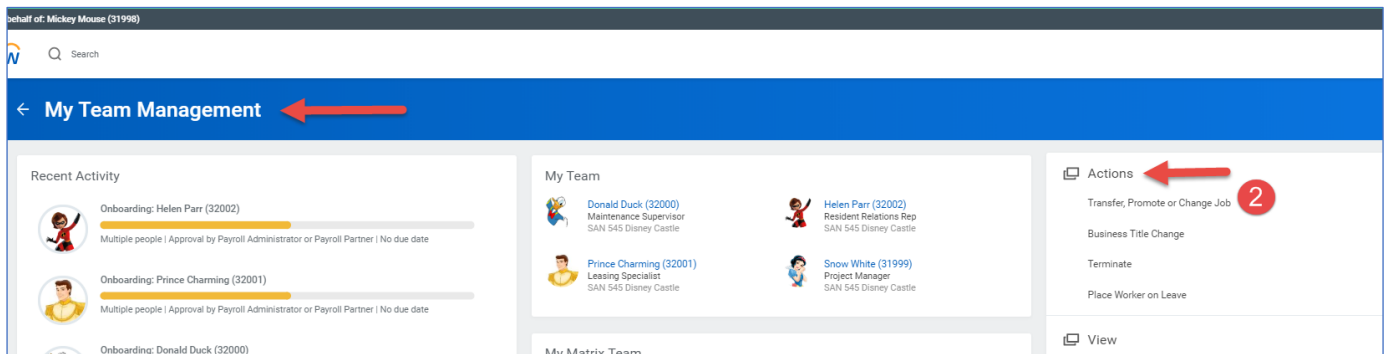
A manager can use the Transfer, Promote, or Change Job function in Workday primarily to perform **transfer**, **transfer and salary increase**, **promotion**, or **promotion and transfer** of the associates.

**Note:** The current manager will start and complete the entire process unless it's a transfer case. In case of a transfer, the current manager will start and submit the request, which will be completed by the new/hiring manager. **The manager's manager will finally approve the application.**

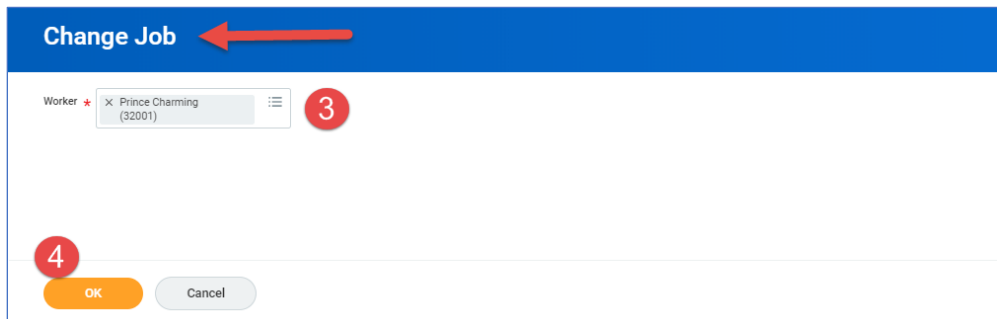
1. Select the **Workday** icon  on OKTA. On the Workday homepage, select **My Team Management** from **Applications**.




2. On the **My Team Management** screen, select **Transfer, Promote, or Change Job** in the **Actions** section.



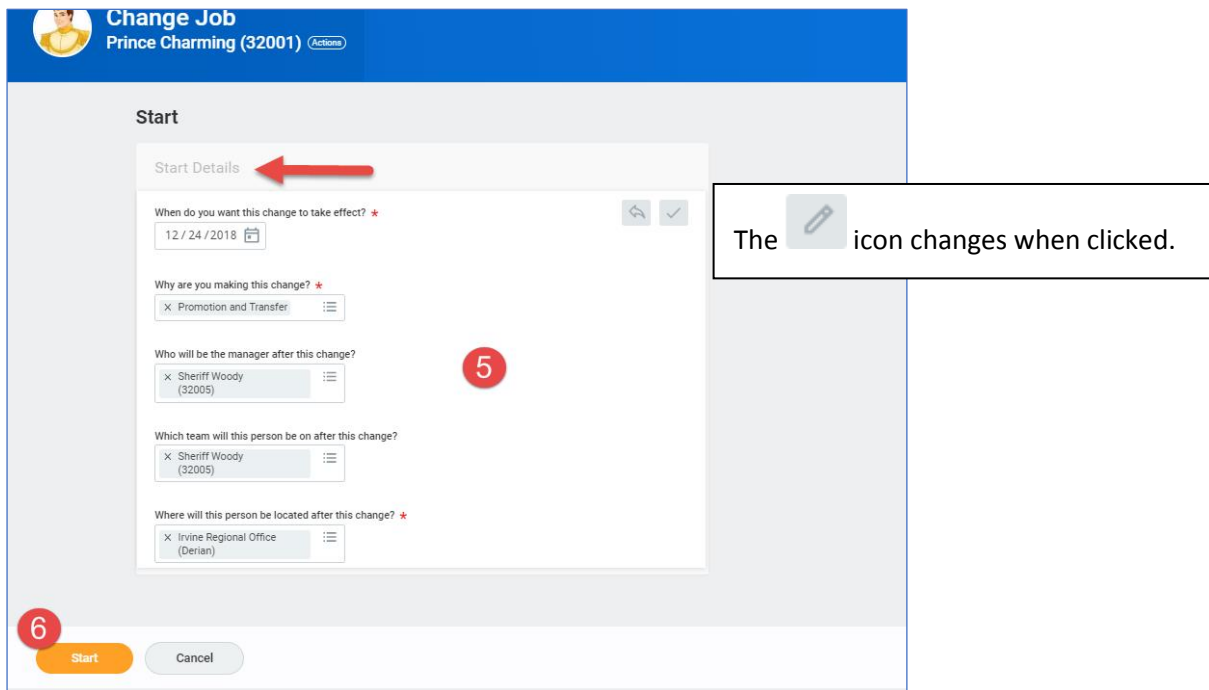
3. On the **Change Job** screen, type the associate's name in the **Worker** field and press the **Enter** key on your keyboard.
4. Click **OK**.



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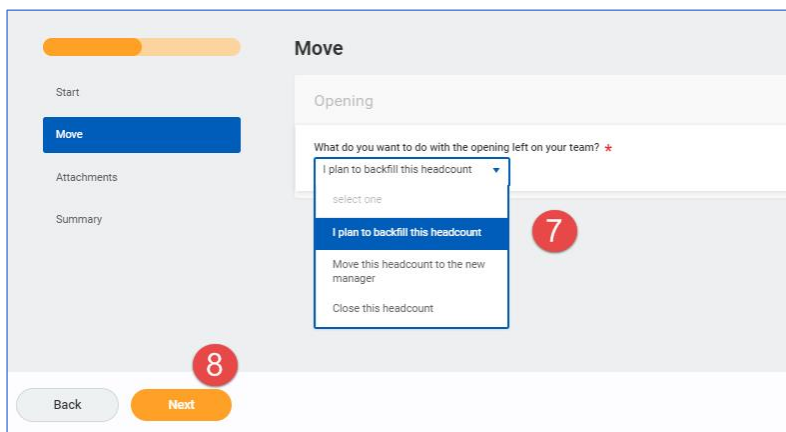
The next screen will allow to start the application for the change. In the **Start Details** section, you will find the pencil icon  on the right side of the screen.

5. Click the pencil icon to enter the following details:
  - a. Enter the date you want the change to take effect.
  - b. Reason for making the change.
  - c. Update the manager's name if it's a transfer.
  - d. Update where the associate will be located after the change, in case of a transfer.
6. Click **Start**.



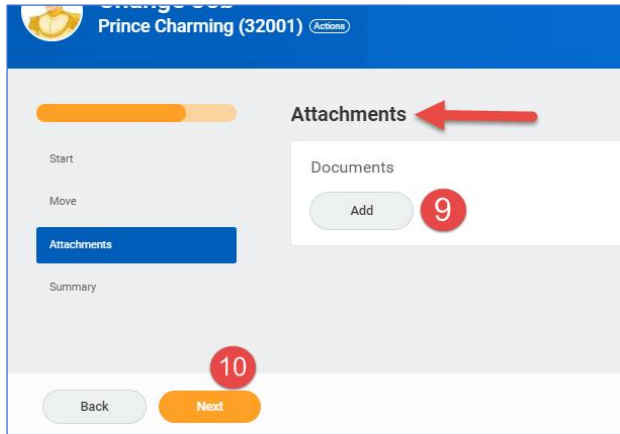
On the next screen you'll specify what you want to do with the open position in your team.

7. Select the appropriate option.
8. Click **Next**.

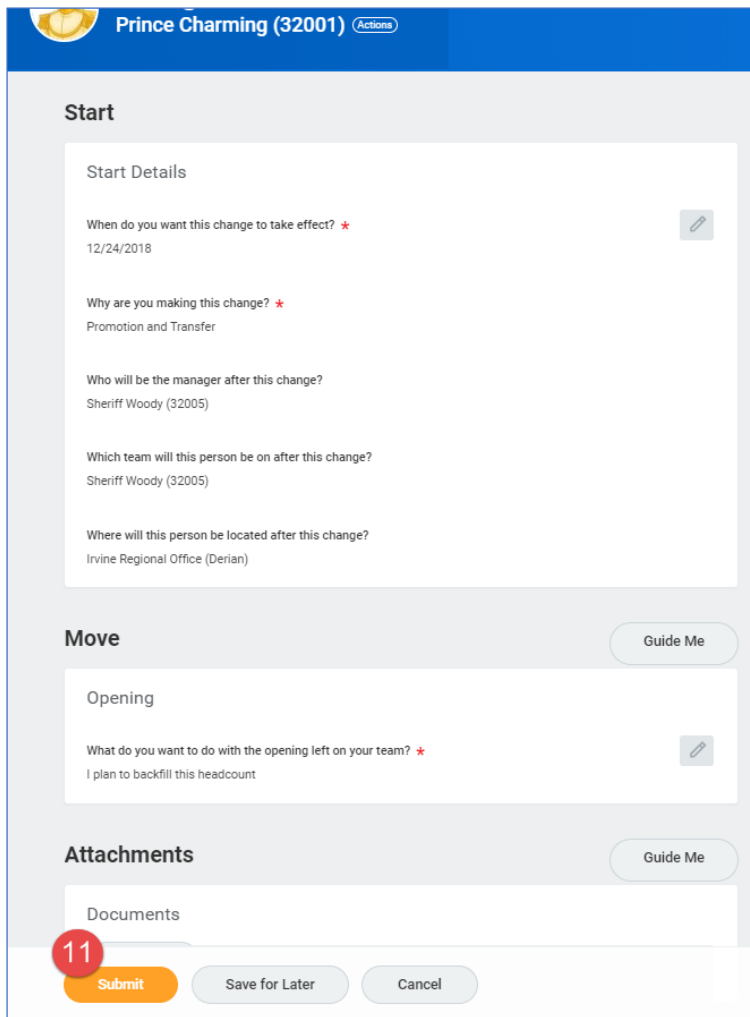


## Workday Job Aid – Transfer, Promote, or Change Job

- On the **Attachments** screen, click the **Add** button to upload any documents if necessary.
- Click **Next**.



- Review the information for accuracy and click **Submit** to proceed.



On the next screen, click **Done** to confirm application submission.

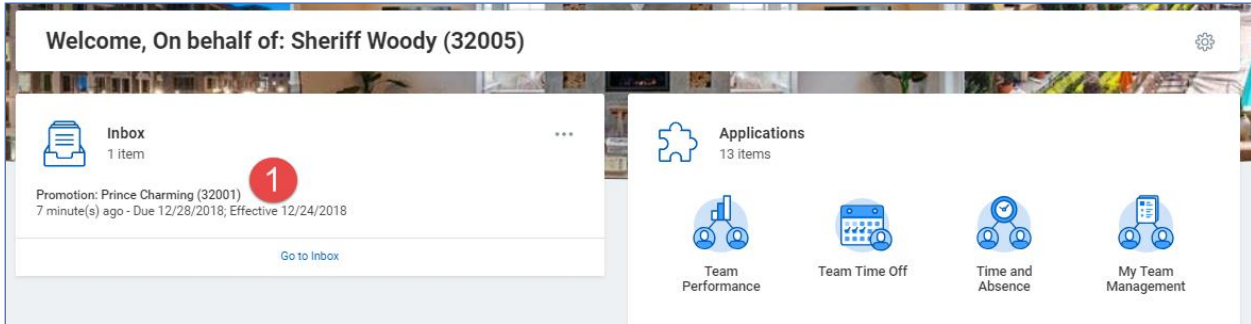
- If it's a transfer case, then the hiring manager will complete the next steps.
- Otherwise the current manager will complete the entire process.

## Workday Job Aid – Transfer, Promote, or Change Job

Since this is an example of an associate’s promotion and transfer, the next steps will be completed by the hiring manager. The hiring manager receives a notification on their Workday homepage.

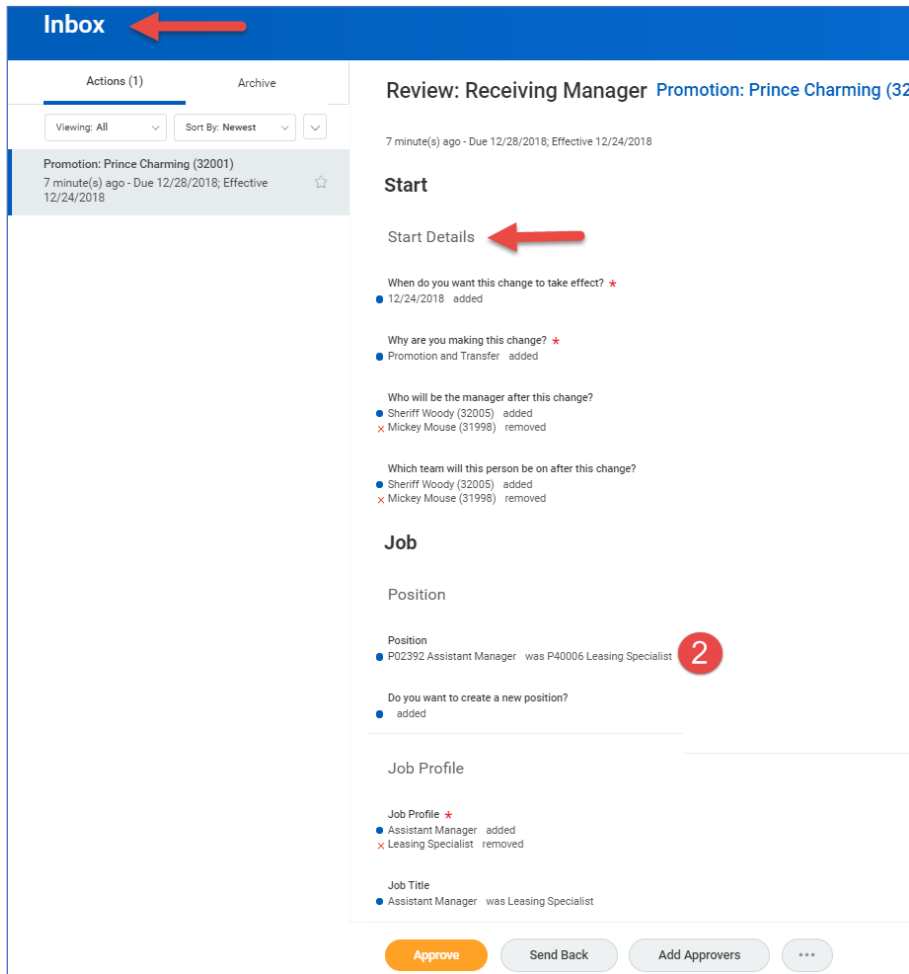
### \*\*Steps for Hiring Manager

1. Click the notification to proceed.



2. Review the **Start Details** submitted by the current manager and update the **Position** under **Job** section.

The Job Profile, Business Title, Location Details, and Administrative Details fields will auto-populate according to the job position.



## Workday Job Aid – Transfer, Promote, or Change Job

3. Scroll down to update the **Salary** section. Enter the hourly rate for a non-exempt associate or salary for an exempt associate. Other fields will auto-populate.
4. Enter the **Bonus** information.

The screenshot shows a form with three main sections: Salary, Hourly, and Allowance. Below Allowance is the Bonus section. Red arrows point to the 'Salary' and 'Bonus' headers. Red circles with numbers 3 and 4 highlight the 'Assignment Details' for the Hourly and Bonus sections, respectively.

**Salary** ←

Add

**Hourly**

Assignment Details  
● 25.00 USD Hourly was 18.50 USD Hourly 3

Plan Name  
Hourly Plan

Effective Date  
● 12/24/2018 was 09/15/2017

Add

**Allowance**

Add

**Bonus** ←

Assignment Details  
● 1,500.00 USD Annual: Individual Target added 4

Plan Name  
● Annual Bonus added

Effective Date  
● 12/24/2018 added

5. Enter a Comment. Please note that it's required to enter a comment.
6. Click **Approve**.

The screenshot shows the bottom part of the form. A comment field is highlighted with a red circle and the number 5. Below it is the 'Process History' section, which lists two actions: 'Mickey Mouse (31998) Change Job- Step Completed' and 'Sheriff Woody (32005) Review: Receiving Manager- Awaiting Action'. At the bottom, there is a row of buttons: 'Approve' (highlighted with a red circle and the number 6), 'Send Back', 'Add Approvers', and a three-dot menu.

enter your comment 5

**Process History**

Mickey Mouse (31998)  
Change Job- Step Completed

Sheriff Woody (32005)  
Review: Receiving Manager- Awaiting Action

6 Approve Send Back Add Approvers ...

## Workday Job Aid – Transfer, Promote, or Change Job

On the next screen, click **Done** to complete the process and forward the application to your manager for a final approval.

**Final approval is required by the manager’s manager.**

**\*\* If the reason for Change job is not transfer, then the current manager will update the Position, salary, and bonus information.**

The screenshot below is *an example of Change Job without transfer*.

Tinker Bell (32008) Actions

Start

**Job**

Location

Details

Attachments

Compensation

Organizations

Summary

### Job

**Position**

Position  
P02384 Leasing Specialist

Do you want to create a new position?

Is the current position available for overlap?  
No

**Job Profile**

Job Profile \*  
Leasing Specialist

Job Title  
Leasing Specialist

**Business Title**

Business Title  
Leasing Specialist

Back Next

Update the Position.

Use the **Next** button to navigate to the next screens. You'll update the **Salary** and **Bonus** information on the **Compensation** screen.

**Appendix**

<b>Types of Change Job</b>	<b>Description</b>
Compensation (only money)	<ul style="list-style-type: none"> <li>• Salary Change - Change in salary and no other changes</li> </ul>
Demographic Changes	<ul style="list-style-type: none"> <li>• Hours Change - Change in hours scheduled per week without changing Part Time or Full Time status</li> <li>• Status Change - Change in Employee Type (Part Time to Full Time, Temporary to Regular, or vice versa)</li> <li>• Supervisor Change - Change only with the supervisor, no transfer or cost center changes</li> </ul>
Promotion	<ul style="list-style-type: none"> <li>• Promotion - Change to a higher position, may also include compensation increases, status change, etc.</li> <li>• Promotion and Transfer - Change to a higher position as well as change in cost center/manager</li> <li>• Promotion Ops to Corp - Change to a higher position from Operations to Corporate</li> </ul>
Title Change	<ul style="list-style-type: none"> <li>• Only a change of Title or a lateral change in positions with no change in Pay. For example, Leasing Specialist to Resident Relations Representative or Accountant to Accountant, Private Equity</li> </ul>
Transfer	<ul style="list-style-type: none"> <li>• Transfer - Change of Cost Centers or Location with no compensation change or position change</li> <li>• Transfer and Decrease - Change of Cost Centers within the same position and a decrease in compensation</li> <li>• Transfer and Salary Increase - Change of Cost Centers within the same position and an increase with compensation</li> <li>• Transfer and Status Change - Change of Cost Centers with the same position but may go from Full Time to Part Time or Temp to Regular Full Time. May also have compensation changes in this transfer</li> <li>• Transfer and Title Change - Change of Cost Centers as well as a lateral title change. May also include compensation changes</li> </ul>

<p><b>MOST COMMONLY USED</b></p> <ul style="list-style-type: none"> <li>• Transfer</li> <li>• Transfer and Salary Increase</li> <li>• Promotion</li> <li>• Promotion and Transfer</li> </ul>
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