
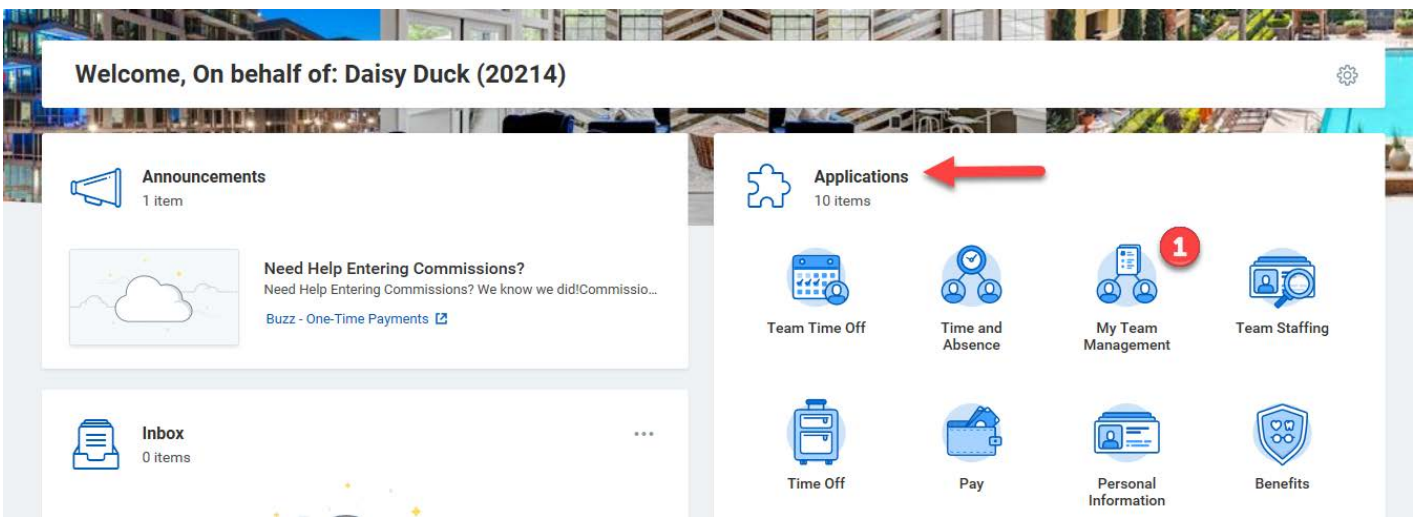


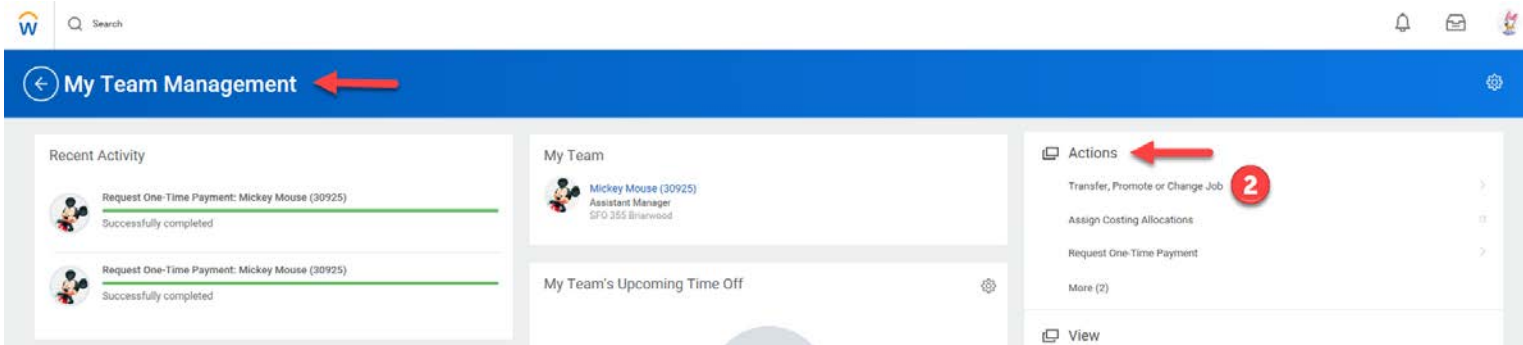
A manager can use the Transfer, Promote, or Change Job function in Workday to perform various Promotions and transfers. This job aid will focus on Promotions that don't require a new position to be created. The promotion will be within the same position and generally same manager.

For example: **Assistant Manager to Sr Assistant Manager** or **Acting Area Manager I to Area Manager I**.

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

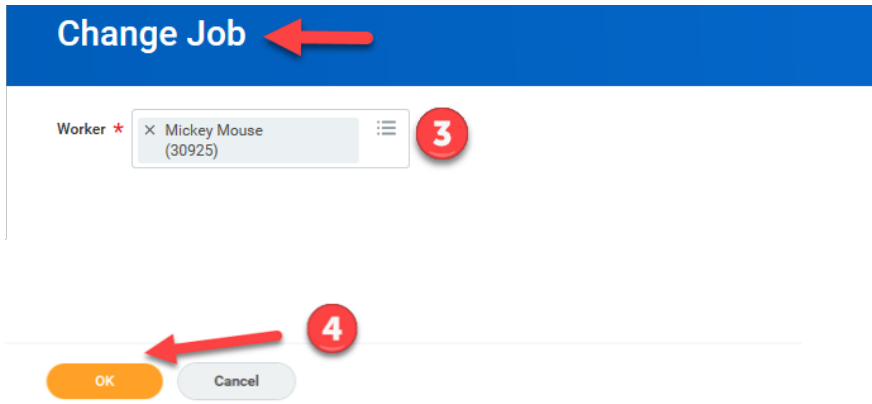



2. On the **My Team Management** screen, select **Transfer, Promote, or Change Job** in the **Actions** section.




## Workday Job Aid – Change Job: Promotion within the Same the Position

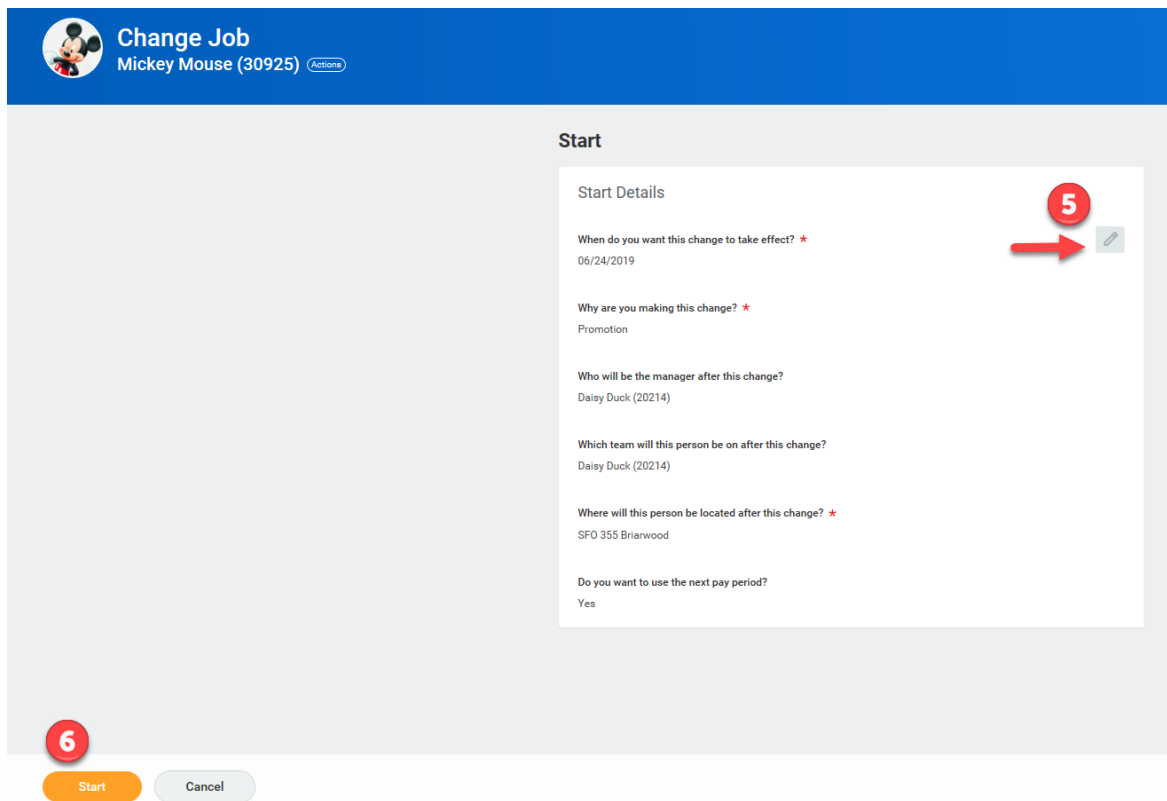
3. On the **Change Job** screen, type the associate’s name in the **Worker** field and press the **Enter** key on your keyboard.
4. Click **OK**.



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

The  icon changes when clicked.

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: *most likely promotion or title change*
  - c. Manager will likely stay the same
6. Click **Start**.



On the next screen you'll specify the new position by updating the JOB PROFILE.

- 7. Select the appropriate option by typing the job title and clicking enter (i.e Sr Assistant Manager)
- 8. Click **Next**.

**Change Job**  
Mickey Mouse (30925) Actions

**Job**

Position  
P-03564 Assistant Manager

Do you want to create a new position?

Is the current position available for overlap?  
No

**Job Profile**

Job Profile \* **7** Update the Job Profile  
Sr Assistant Manager

Job Title  
Sr Assistant Manager

**Business Title**

Business Title  
Sr Assistant Manager

Back Next **8**

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

9. Location: Ensure the location and scheduled weekly hours are correct.

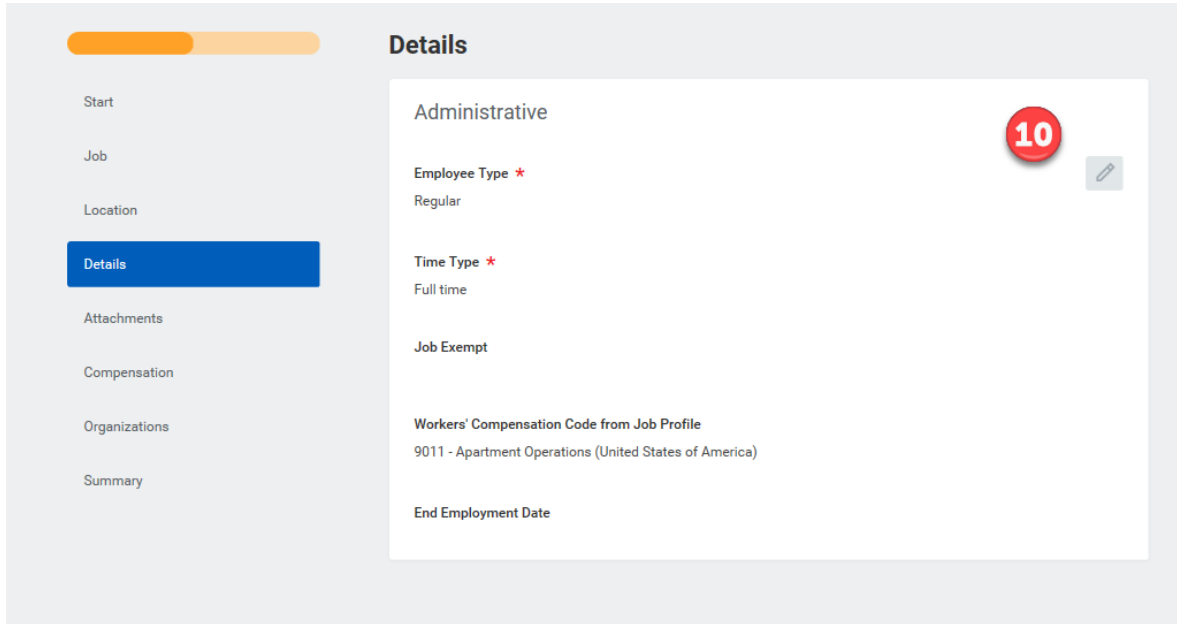
**Location**

Location Details **9**

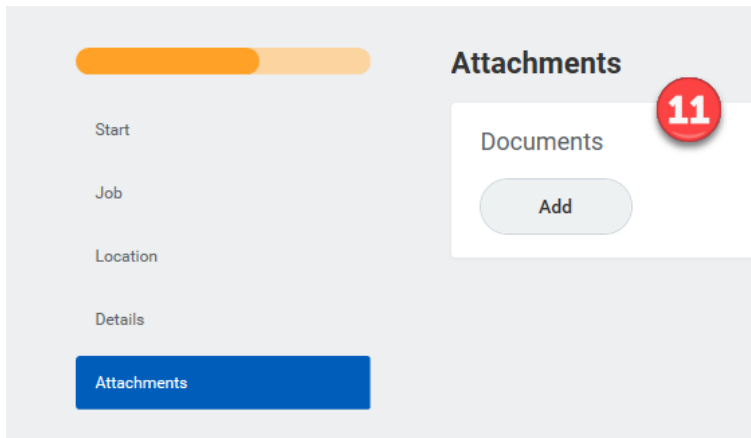
Location \*  
SFO 355 Briarwood

Scheduled Weekly Hours  
40

10. Details: Ensure Employee Type and Time Type are still correct. Click next when done.



11. Attachments: Add any necessary Attachments. Click next when done.



## Workday Job Aid – Change Job: Promotion within the Same the Position

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

The screenshot shows a compensation form with four main sections: Salary, Hourly, Allowance, and Bonus. Each section has an 'Add' button. Red arrows point to the 'Add' buttons for the Salary and Bonus sections. A red circle with the number '12' is placed over the 'Add' button for the Hourly section, and a red circle with the number '13' is placed over the 'Add' button for the Bonus section. The Hourly section shows 'Assignment Details' as '25.00 USD Hourly', 'Plan Name' as 'Hourly Plan', and 'Effective Date' as '09/17/2018'. The Allowance section shows 'Assignment Details' as '10.00 USD Semimonthly: Individual Target', 'Plan Name' as 'Wellness Credit', and 'Effective Date' as '09/17/2018'. The Bonus section shows 'Assignment Details' as '1,500.00 USD Annual: Individual Target' and 'Plan Name' as 'Annual Bonus'. At the bottom, there are 'Back' and 'Next' buttons, and an 'Effective Date' field with the value '09/17/2018'.

- 14. Organizations: Ensure Cost Center is Correct. Click next when done.

The screenshot shows the 'Organizations' section of a Workday form. On the left is a navigation menu with items: Start, Job, Location, Details, Attachments, Compensation, Organizations (highlighted in blue), and Summary. The main content area has a title 'Organizations' and two input fields. The first field is 'Company' with the value 'Essex Property Trust, Inc.'. The second field is 'Cost Center' with the value '355 Briarwood'. A red circle with the number '14' is placed over the 'Cost Center' field. There is a small edit icon to the right of the 'Cost Center' field. At the bottom right, there is a page number '5 of 6'.

- 15. Next tab is the Summary of the Change Job, please review all changes and add a detailed comment as to why the change is occurring
- 16. Click Submit

- 17. The Change Job will now go through approvals. You will receive a notification when it is completed.

**You have submitted**  
**Promotion: Mickey Mouse (30925)** [Actions](#)

Up Next



Minnie Mouse (9879)



Review Change Job

Due Date 06/19/2019