Manage Employee and Contingent Worker Job Changes

This job aid provides managers step-by-step instructions on how to use Workday for employee* and contingent worker** job changes. Additional Employee Services approvals may be required.

Contingent Worker	A worker who is not on Lynn's payroll and not eligible for benefits (i,e., consultants, contractors or vendors). They will display in workday a [C] next to their name (i. e., John Doe [C])
Employee	An individual who works directly for Lynn University, is paid through Payroll and may be eligible for university benefits.

On this job aid:

Transfer, Promote, and Change Job
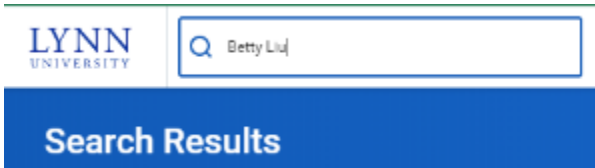
Change Employee's Location

Terminate an Employee

Change Contingent Worker Details

Convert Contingent Worker to Employee

Transfer, Promote, and Change Job

If a promotion or other job change is within the same department, it is a one-person task. If the change involves a transfer between departments, it is a two-person process as involves current and future manager. The manager in the current supervisory organization initiates the transfer of the employee to the receiving manager. The manager in the incoming supervisory organization performs another set of actions to receive the employee.

1. Search staff's name

2. From the targeted employee's profile:
3. Select the **Actions** Actions button.
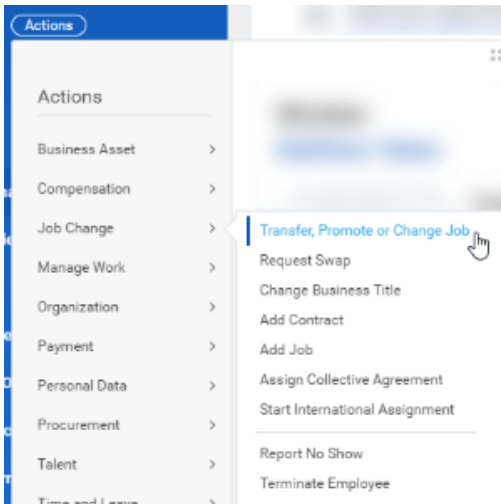
4. Select **Job Change** > **Transfer, Promote, or Change Job** to display the Change Job page.
5. Click the **Edit** ✎ icon to enter or modify the information. Red asterisks denote required fields.

    a. For the start date, make sure you verify the date with Employee Services as the changes may affect payroll, benefits, etc.

    b. Select a reason for the change

    c. If the employee is to report to a new manager, enter the new supervisory organization.

Which team will this person be on after this change?

6. Click **Start**. A progress bar displays to guide you through the process.

Start   Cancel

7. Click **Next** to move through the various sections or click **Summary** to edit using a single-page view.

Job

Position

8. Click the **Edit** ✏ icon to enter or modify the information next to each section: Position, Job Profile and Business Title.

> ⊗ Note: For promotions and other position changes, your new position and job profile needs to be already available in Workday prior to the job change.

9. Complete the Academic tab for faculty and other academic staff (if applicable)

Academic

Annual Work Period

Work Period Percent of Year

Disbursement Plan Period

10. Salary changes will require to complete the Compensation tab.

Compensation

11. Once all edits are made, click **Submit**. You can also save your work for later.

Submit   Save for Later   Cancel

Your request will go to Employee Services for approval. Click the **Details and Process** arrow and navigate to the **Process** tab to view the next steps in the Change Job business process. The Status field indicates whether there are any required actions or steps to complete.
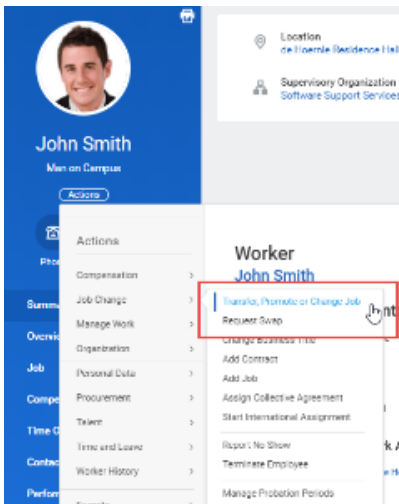
> **Note**
>
> You can also manage job changes by navigating to the My Team application. From the Actions section, you can initiate a transfer, promotion, job change, or location change for an employee.

Change Employee's Location

1. Search staff's name and select employee from search results.
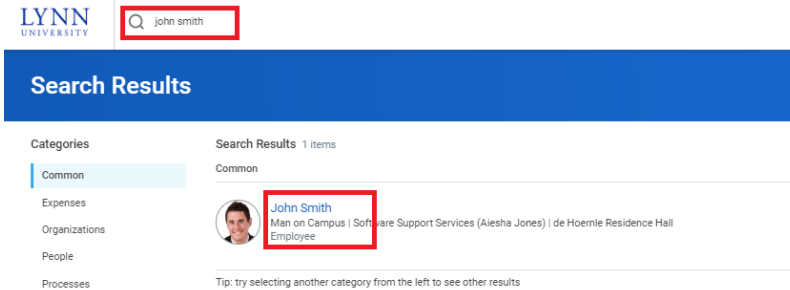
2. From the employee's profile, select the **Actions** [Actions] button.
3. Select **Job Change** > **Transfer, Promote, or Change Job** to display the Change Job page.

4. Click the **Edit** ✎ icon to enter or modify the information. Red asterisks denote required fields.

Start Details

When do you want this change to take effect? *

06 / 01 / 2020 📅

Why are you making this change? *

[   ] ☰

Who will be the manager after this change?

× Aiesha Jones ⋯ ☰

Which team will this person be on after this change?

× Software Support Services ⋯ ☰
(Aiesha Jones)

Where will this person be located after this change? *

× de Hoernle Residence Hall ⋯ ☰

Do you want to use the next pay period?

☑

5. Enter the effective date for the change

When do you want this change to take effect? *

06 / 01 / 2020 📅

6. Enter a reason for change. Select Change Location.

Why are you making this change? *

Search ☰

× Change Location

7. Under location, click the X next to the building.

Where will this person be located after this change? *

× de Hoernle Residence Hall ⋯ ☰

8. Click on the 3 lines, select all locations. Scroll down and select the new location for employee.

← All Locations

⦿ Assaf Academic Center

○ Bobby Campbell Stadium

○ Campus Communication Center

○ Central Energy Plant

○ Christine E. Lynn University Center

○ College of Aeronautics

○ de Hoernle International Center

○ de Hoernle Residence Hall

○ de Hoernle Sports and Cultural Center

○ E. M. Lynn Residence Center

○ ....

Search ☰

Where will this person be located after this change? ⭑

```
Search                                    ☰
  ✕  Christine E. Lynn University    ...
     Center
```

> **Note**
>
> For Adjunct faculty or If employee works remotely, select "Remote" as location.

9. Click **Start**. A progress bar displays to guide you through the process.

10. Click next on all remaining screens, click submit at the end.
11. Your request will move to Employee Services for approval.

Terminate an Employee

As a manager, you may have to terminate an employee after they have been asked to leave or have resigned.

From an employee's profile:

1. Select the **Actions** [Actions] button.
2. Select **Job Change** > **Terminate Employee** to display the Terminate Employee page.
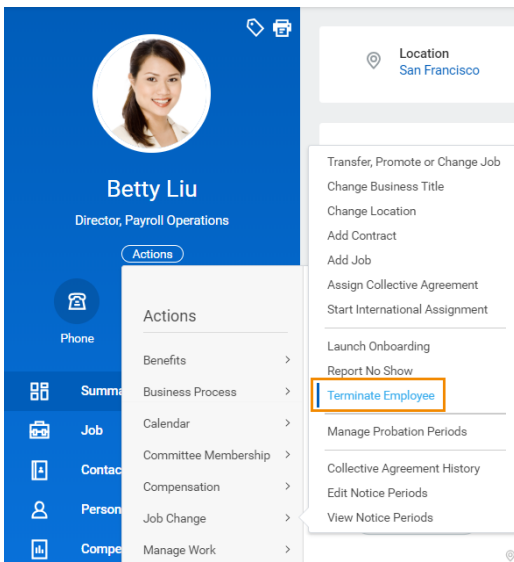
3. Complete the required termination information. Here, you will enter a termination date and reason. The employee is still considered active until midnight on the termination date.
4. Indicate whether the position will be closed or available for overlap after this termination. Position overlap allows a replacement worker to be hired into the same position before the current worker leaves.
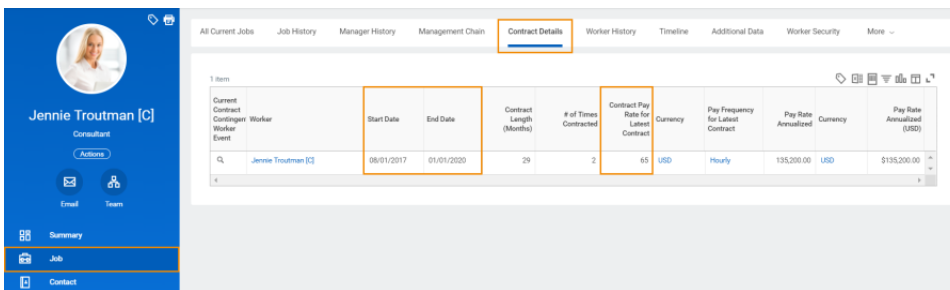5. Click **Submit**.

> **Note**
>
> You can also terminate an employee by navigating to the My Team or Employee Changes application and selecting the Terminate action.

Change Contingent Worker Details

Contingent workers are defined as freelancers, independent contractors, consultants, or other outsourced and non-permanent workers who are hired on a temporary basis. You can change a contingent worker's details, such as hourly Rate. You can also change a worker's contract length if you want to extend their contract.
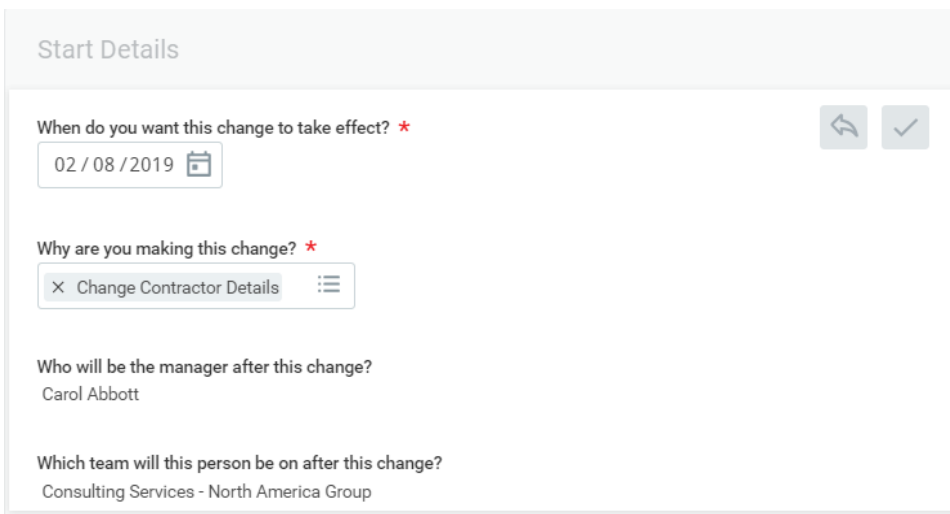
From the My Team application on the Home page:

1. Select the contingent worker's **profile**.
2. Click the **Job** tab, then the **Contract Details** sub-tab. Here, you can view details, such as Contract Length and Pay Rate.

3. Click the worker's **Actions** [Actions] button.
4. Select **Job Change** > **Change Contingent Worker Details**.
5. Click the **Edit** [pencil icon] icon.
6. Enter the Effective Date and Reason for this change.

7. Click **Start**.
8. Follow the guided editor.
9. Edit and select a new Contract End Date and Pay Rate, as needed.
10. Click **Next**.
11. Verify your changes and make any additional edits.
12. Click **Submit**, then **Done**.

Convert Contingent Worker to Employee

You can also change a worker from contingent to full-time if you choose.

From the contingent worker's profile:

1. Select the **Actions** Actions button.
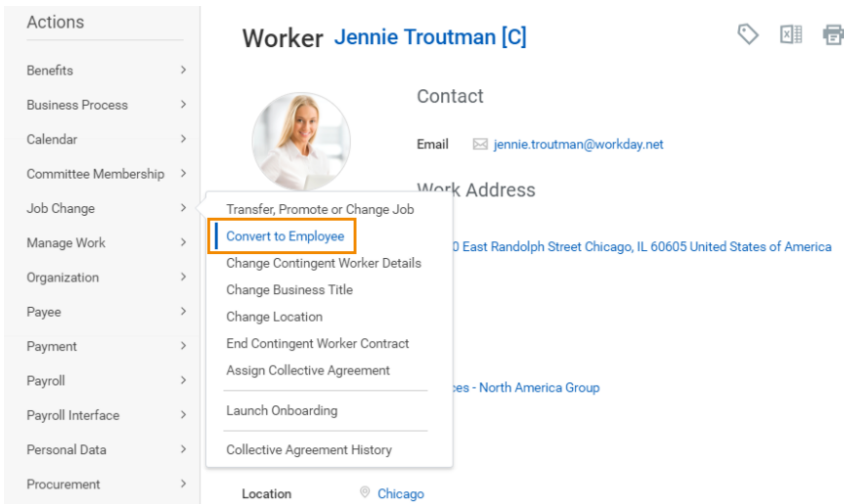
2. Select **Job Change** > **Convert to Employee**.
3. Select the supervisory organization to which you want the employee to belong.
4. Click **OK**.
5. Enter a Hire Date that occurs after the contract end date.
6. Select the reason for hiring the employee.
7. Enter job details such as Position, Employee Type, Job Profile, Time Type, Location, and Pay Rate Type.
8. From the End Contract Details section, enter the Contract End Date. This field may have auto-populated.
9. Select the reason for ending the contract, and lastly, enter the Last Day of Work. This field may have auto-populated as well.
10. Click **Submit**.

> **Note**
>
> Additional steps in the business process for converting a contingent worker to an employee may be required after the manager submits the request.