

Change Job: Performance Related Demotions

In Workday, the **Change Job** business process is designed to allow a variety of changes to a worker, including but not limited to transferring to a new position, changing the worker's location, or even modifying the worker's FTE.




Do you have a delegate? Change job is a process that is available for delegation. That means a delegate can initiate a change job transaction. However, certain subprocesses, such as Propose Compensation Change, will still route to you as the manager for you to take action and/or approve.

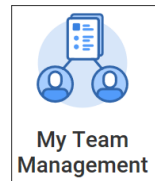
DEMOTION DEFINITION

This job aid details how to process a **Performance Related Demotion**. A Performance Related Demotion is an involuntary change in a worker's job with decreased qualifications/requirements and/or scope of responsibility. This change is driven by the worker's job performance. A potential outcome of this type of change is a decrease in pay.

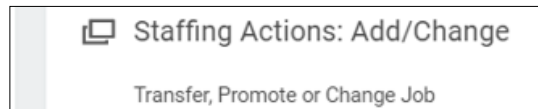
If a worker is **voluntarily** taking a new role that has decreased qualifications/requirements and/or scope of responsibility, **work with your Recruiter** on options to process this change.

PROCESSING THE CHANGE JOB

At any point in this process, you can use the  **WalkMe Smart Tips** for guidance.



1. Log into Workday. On your home screen, select your **My Team Management** application.
2. On the right-hand side, you can see the **Staffing Actions** menu. Select the first option: **Transfer, Promote or Change Job**.
3. At this point, you will need to identify who you are completing the transaction on. You can **type their name** in the box and **hit Enter** then click **OK**.



4. Select an **Effective Date**, which must be the beginning of a pay period, or use the defaulted date of the beginning of the next pay period.
5. Select **Demotion > Performance Related** as the **reason**.



Timely processing is extremely important! To provide an excellent experience for our workers, all Change Job transactions must be submitted with future effective dates.

6. The other fields on this screen will most likely stay the same during a Performance Related Demotion. However, pay special attention to be sure the data is accurate. To proceed to the additional screens, click **Start**.

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Job

Position

Position
P-57465 Case Manager Behavioral Health

× P-57465 Case Manager Behavioral Health ... ☰

Do you want to create a new position?

Close the current position?

Is the current position available for overlap?

7. Performance Related Demotions typically require a new position. **You will need to update** the Position to a position you have previously created and obtained approval for. Click on the **Position** field, **type in the new position number or title** and **hit Enter**.

8. You will need to choose if you want to **Close the current position** (if you are not backfilling) or **indicate the current position is available for overlap** (if you intend to cross train).

9. Take an opportunity to review the **Location, Details, Organization, and Attachment** screens using the **Next** button. While nothing else typically changes during a Performance Related Demotion, pay attention to be sure the data is accurate.

10. The last screen, **Summary**, provides you an opportunity to review all the information to confirm accuracy. If you need to make a correction, simply click on the section you need to correct and make the edit. When you have reviewed, click **Submit**.

11. A pop-up window will appear in the middle of your screen. Click **Open**.

12. Now is the **Propose Compensation Change** step. Here, you will see most of the details defaulted in.

13. **Scroll down** to the appropriate section, Salary or Hourly, depending on the job. Here, you can **click on the pencil icon**. You will need to **type in the new rate to change the pay rate**. **Do not** click the add button.

14. Once you've updated the rate, **continue scrolling** to ensure all other compensation plans are still accurate. Once reviewed, click **Submit**.

Hourly

Assignment Details
● 0.00 USD Hourly added

Plan Name
● Hourly added

Effective Date
● 05/09/2021 added

Add

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15. Another pop-up window will tell you what is next. The process will route to Human Resources to review/take action. You will have no further tasks related to this process prior to it taking effect. However, you may have other tasks related to Change Job that are covered in the [Change Job Manager Tasks](#) job aid.



To check the progress of your transaction at any time, navigate to the worker's profile. Select **Job** on the left-hand side, then **Worker History** across the top. Find the Change Job transaction with the effective date you used and click on the blue link. You can then select the **Process** tab.

WHAT ABOUT THE WORKER?

As part of the Change Job process, your worker will receive tasks in their Workday inbox. These are covered in the [Change Job - Worker Tasks](#) job aid.

Be sure to **encourage them to log into their Workday account** frequently to ensure they do not miss these important tasks.

WHAT ABOUT OTHER SYSTEMS?

Downstream systems such as UKG (Kronos), Outlook, Teams and Epic will update once the changes are made in Workday.

If you do not see these downstream systems reflect the change 1-2 business days after the effective date of the change, **please contact the IT Service Desk at 570-271-8092.**