Change Job: Change in Supervisor

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, when changing supervisor, the delegate is only able to take action on the steps for the manager they support.

THINGS TO CONSIDER

This job aid details how to process changes to **Supervisor** for individual workers. If you need to change the supervisor for multiple workers, please refer to our **Mass Supervisor Change** job aid.

- **If multiple data elements are changing,** work with your Recruiter to discuss your options.
- If one of your workers applied to a new role, **do not submit a Data Change.** The Change Job will be processed by Human Resources.

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**.
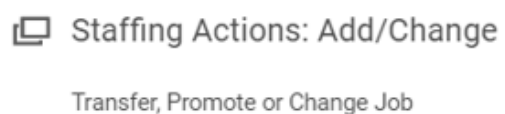
PROCESSING THE CHANGE JOB

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

This process involves both the Current Manager and the New Manager. Communication is key to ensure a smooth process.

> This section includes steps for the **Current Manager**.

1. The **Current Manager** should log into Workday. On their home screen, select the **My Team Management** application.

2. On the right-hand side, Select the first option **Transfer, Promote, or Change Job** under the **Staffing Actions** menu.

Staffing Actions: Add/Change

Transfer, Promote or Change Job

3. At this point, identify the worker who is changing supervisors. **Type their name** in the box and **hit Enter** then click **OK**.

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

When do you want this change to take effect? ⭑ ❓

05/09/2021 📅

Why are you making this change? ⭑ ❓

✕ Change in Supervisor ☰

Who will be the manager after this change? ❓

james ✕

Search Results (30)

☐ ☁ **James**
Area Manager Clinical Engineering ISS | ISS Healthcare Technology Management (NG) Mid Atlantic West Division

☐ ☁ **James**
Manager Invasive Cardiac Laboratories | Northeast Region Heart Institute Department

☐ ☁ **James**
Manager Marketing | System Marketing Department

☁ **James**

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 **Data Change > Change in Supervisor** as the reason. If the worker is a **Contingent Worker**, choose **Change in Contingent Worker Contract**.

6. Click on the **Who will be the manager** field and **type** in the new manager's name. Hit **Enter**. Choose the appropriate manager from the drop down by **clicking the checkbox**.

7. Click on the **Which team** drop down menu and choose **Supervisory Organizations for Manager**.

If the worker **is Per Diem or is a Contingent Worker**, you must choose the team **with the JM-** in front of the name.	If the worker **has budgeted hours**, you must choose the team **without the JM-** in front of the name.

JM- indicates a Job Managed supervisory organization (sup org), while Position Managed sup orgs do not have a prefix. More information can be found on this job aid.

8. To proceed to the additional screens, click **Start**.

Move

Opening

What do you want to do with the opening left on your team? ⭑ ❓

I plan to backfill this headcount ▼

Is this position available for overlap?

☑

9. If the worker **has budgeted hours, you must choose** what to do with the position that is being vacated with the dropdown menu. You can either backfill, close the position or move the headcount.

> **Move this headcount to the new manager** is the most common selection for this process.

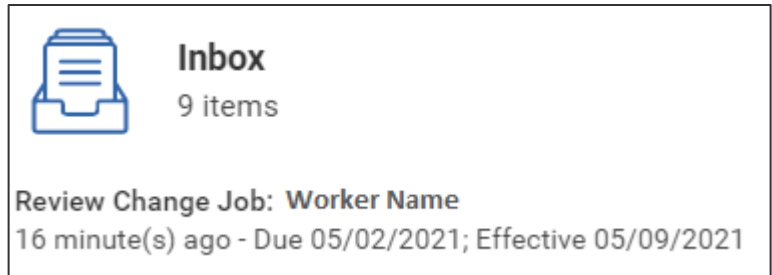If you choose to **backfill** the opening, be sure to click the check box to **allow position overlap**.

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10. Click **Next** and then **Next** again.

11. 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**.

At this point, reach out to the new Manager to alert them that they are next in the process.

This section includes steps for the New Manager.

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12. The **New Manager** should log into Workday.

13. On their home screen, review the **Inbox** items. There should be one called **Review Change Job**, with name of the worker who is being moved.

> **Inbox**
> 9 items
>
> Review Change Job: Worker Name
> 16 minute(s) ago - Due 05/02/2021; Effective 05/09/2021

14. Review the information carefully and make any corrections necessary by clicking on the field and selecting the proper value.

If the worker **has budgeted hours,** and the Current Manager **did not elect** to move headcount, **you must choose a position** for the worker. **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**.

> If the wrong **Move** option is chosen, you can use the **Send Back** button at the bottom of the screen to send the transaction to the previous manager to fix.

15. At this point, a pop-up window will tell you what is next. The process **may** route to Human Resources to review / take action. You will have no further tasks related to this process prior to it taking effect.

> Both the Current and the New Manager may receive other tasks related to Change Job that are covered in the **Change Job – Manager Tasks** job aid.