**Description:**  This scenario-based tool is designed to help you decide when to use the Supervisory Organizations Change Request (Move Worker) and HR processes to move around workers (employees) and/or PINs (positions) in Workday. This is intended for HR Staff ONLY.

**Instructions:**  If your answer to the “**Sup Org Changes Request Form**” column is: (1) **Yes**, you need to complete the Sup Org Changes Request Form or Excel templates or (2) **No**, you need to use an HR event in Workday. Follow the instructions in the “**What Action You Need to Take…**” column.

| **Scenario** | **Use Sup Org Changes Request Form** | | **What action you need to take…** |
| --- | --- | --- | --- |
| **Yes** | **No** |
| Is an employee being transferred to a completely new PIN (position)?  **Note: there must be (1) a vacant PIN to move the employee into and (2) the PIN must be equaled in grade in order to complete a transfer** |  | **X** | 1. Initiate the transfer using the recruitment process via **JobAps**, and 2. Finalize the transfer using the **Change Job Process in Workday**. |
| Is the employee acting in another position for a temporary period of time? |  | **X** | 1. Complete a request the **Request Compensation Change in Workday**    1. Select the **Acting Capacity Pay** reason    2. Assign acompensation allowance 2. Complete the **Delegating** process   NOTE: may need to complete security access form |
| Is the employee being assigned to a new PIN (position)?  **Note: there must be (1) a vacant PIN to move the employee into and (2) the PIN must be equaled in grade and service to complete a reassignment** |  | **X** | 1. Initiate the reassignment using the **Change Job Process in Workday** and 2. Select the reason: **Transfer – Reassignment** |
| Is the employee being promoted / demoted? |  | **X** | 1. Initiate the appropriate transfer using the recruitment process via **JobAps**, and 2. Finalize the promotion/demotion using the **Change Job Process in Workday**. |
| Swapping/Flip Flopping |  | **X** | 1. Initiate the appropriate position changes for the vacant position 2. Complete the employee transfer, promotion, etc., in **JobAps** and/or **Workday** as required |
| Does the PIN that you just moved, have the new Manager have the required attributes (Bargaining Status, Manager Level, etc)? |  | **X** | 1. To change a location, complete the **Edit Position Restrictions** business process in Workday 2. To change PIN attributes such as Bargaining Status, Cost Center, Check Distribution Codes, use the Change Organization Assignment task in Workday |
| Is the current sup org structure incorrect? E.g., employee reporting to the wrong position. | **X** |  | 1. Complete the organization details on the **Sup Org Changes Request Form** 2. Submit ticket to Shared Services |
| Is the Agency/unit/division reorganizing? Has the reorg been approved by DBM or OBA? | **X** |  | 1. Complete the organization details on the **Sup Org Changes Request Form** 2. Submit ticket to Shared Services |
| Is there a new initiative or a brand new program that requires the movement of positions? | **X** |  | 1. Complete the organization details on the **Sup Org Changes Request Form** 2. Submit ticket to Shared Services |
| Are there one or more supervisory PINs (positions) being moved? | **X** |  | 1. Complete the organization details on the **Sup Org Changes Request Form** 2. Submit ticket to Shared Services |
| Is the Agency/unit/division trading PINs with another Agency/unit/division? Has this been approved through the Budget process? | **X** |  | 1. Complete the organization details on the **Sup Org Changes Request Form** 2. Submit ticket to Shared Services |