



STATEWIDE PERSONNEL  
— S Y S T E M —

**Contractual Conversion  
(SPMS Agencies)**

August 2016



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## Change Job - Contractual Conversion

### Process Overview

To complete a contractual conversion you must complete the following tasks in Workday:

1. **Initiate a Transfer.** Transfer the contractual employee to a State/Regular position that is equivalent to the contractual position.
2. **Propose Compensation Change.** Change the employee's salary plan from an Hourly Plan to a Salary Plan. The transfer and compensation requires approval from the Agency HR Partner and Appointing Authority Partner.
3. **Review Pay Group.** Review the proposed pay group. It should be updated to a State/Regular employee pay schedule. Note that after this task is complete, the contractual conversion is complete in Workday; however, ALL tasks in this list must be completed by the HR Coordinator.
4. **Edit Other IDs.** Mark the employee as a Contractual Conversion. This designation will be on the employee's record.
5. **Maintain Employee Contract.** Close the worker contract as they have converted to a merit position.
6. **Manage Business Processes for Worker.** If the employee has pending tasks in their inbox, the HR Coordinator determines whether the tasks should be reassigned or cancelled.

### Before you begin...

You will need the following information to complete the process:

- A vacant State/Regular position, including position number and name.
- The Supervisory Org name and the Manager name of the vacant State/Regular position.
- The State/Regular salary plan (e.g., Step)
- The employee's new pay group (e.g., Biweekly Regular 10/21, 10/26, or 10/98; or Monthly 30/12)

## Transfer - Contractual Conversion


Verify that there is a vacant State/Regular position that is “available to fill” prior to starting this task. The procedure to transfer a contractual employee from a contractual position to a State/Regular position follows.

### Procedure:

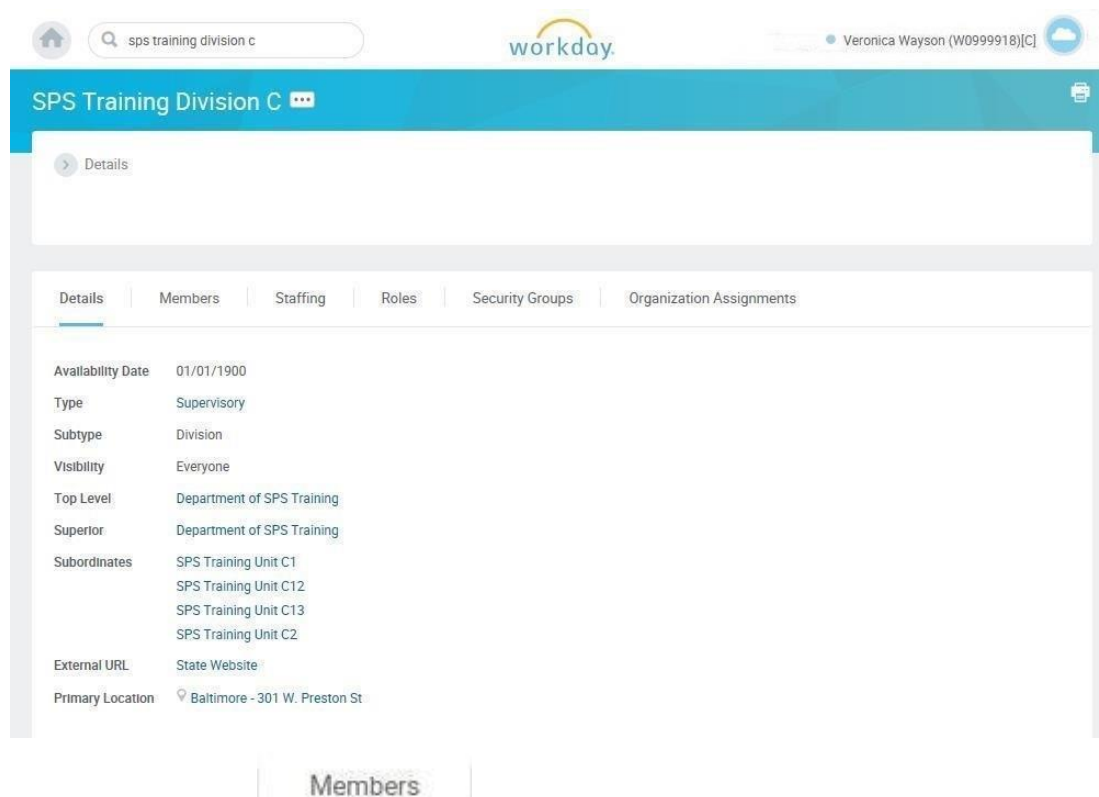
1. Type the Supervisory Organization name in the Search field.



**Tip:** If you know the employee’s name or employee ID for which you are processing a job change, you can search using these values.

2. Click the **search**  icon.
3. Click on the Supervisory Organization hyperlink.

### Supervisory Organization Details



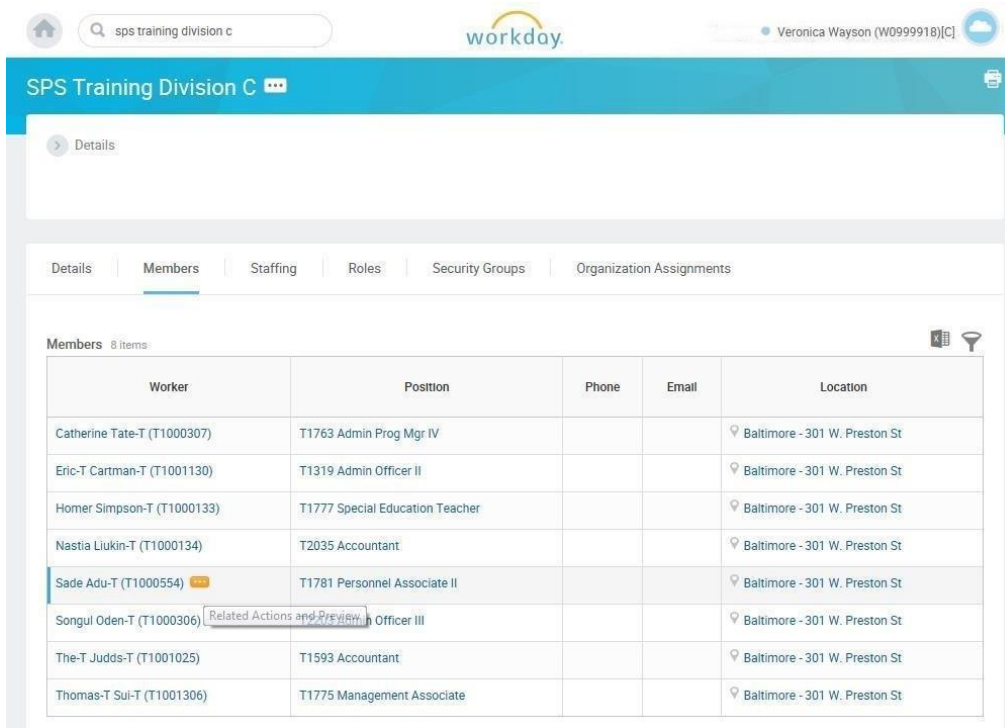
The screenshot shows the Workday interface for the Supervisory Organization Details of SPS Training Division C. The search bar at the top contains "sps training division c". The user is logged in as Veronica Wayson (W0999918)[C]. The page title is "SPS Training Division C". Below the title, there is a "Details" link. The main content area has tabs for "Details", "Members", "Staffing", "Roles", "Security Groups", and "Organization Assignments". The "Details" tab is active, showing the following information:

|                   |  |
|-------------------|--|
| Availability Date | 01/01/1900   |
| Type              | Supervisory  |
| Subtype           | Division   |
| Visibility        | Everyone   |
| Top Level         | Department of SPS Training   |
| Superior          | Department of SPS Training   |
| Subordinates      | SPS Training Unit C1<br>SPS Training Unit C12<br>SPS Training Unit C13<br>SPS Training Unit C2 |
| External URL      | State Website  |
| Primary Location  | Baltimore - 301 W. Preston St  |

Below the details, the "Members" tab is highlighted.


4. Click the **Members**  tab button.

## Organization Members

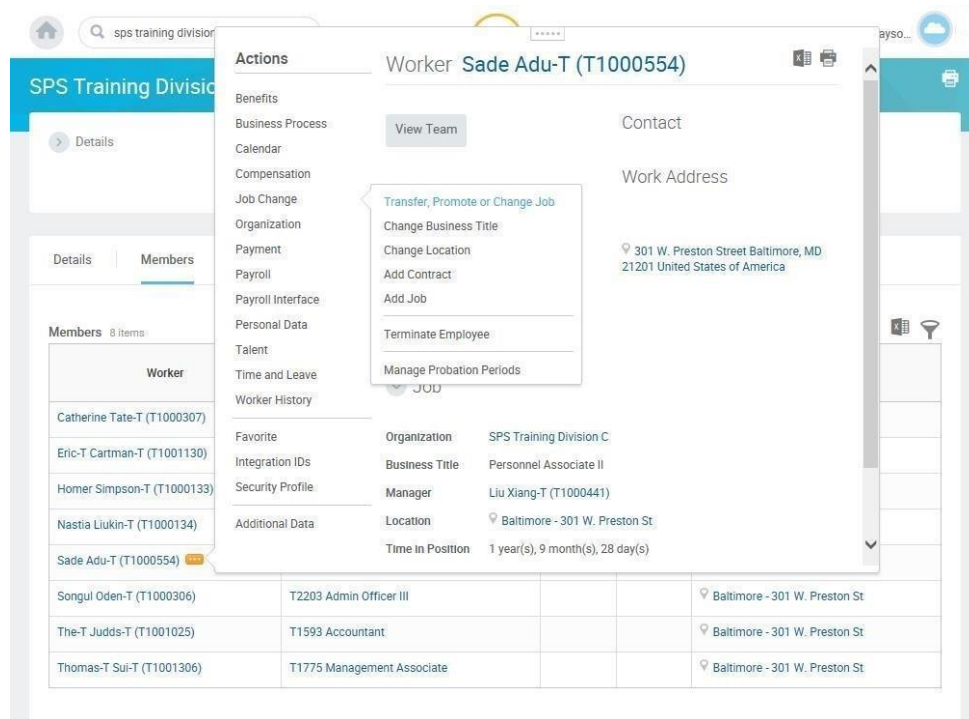


The screenshot shows the Workday interface for the SPS Training Division C. The page title is "SPS Training Division C" and the user is Veronica Wayson (W0999918)[C]. The "Members" tab is selected, showing a list of 8 items. The list includes columns for Worker, Position, Phone, Email, and Location. The employee Sade Adu-T (T1000554) is highlighted, and a tooltip for "Related Actions and Preview" is visible over the "Preview" icon next to her name.

| Worker                      | Position                        | Phone | Email | Location                      |
|-----------------------------|---------------------------------|-------|-------|-------------------------------|
| Catherine Tate-T (T1000307) | T1763 Admin Prog Mgr IV         |       |       | Baltimore - 301 W. Preston St |
| Eric-T Cartman-T (T1001130) | T1319 Admin Officer II          |       |       | Baltimore - 301 W. Preston St |
| Homer Simpson-T (T1000133)  | T1777 Special Education Teacher |       |       | Baltimore - 301 W. Preston St |
| Nastia Liukin-T (T1000134)  | T2035 Accountant                |       |       | Baltimore - 301 W. Preston St |
| Sade Adu-T (T1000554)       | T1781 Personnel Associate II    |       |       | Baltimore - 301 W. Preston St |
| Songul Oden-T (T1000306)    | Officer III                     |       |       | Baltimore - 301 W. Preston St |
| The-T Judds-T (T1001025)    | T1593 Accountant                |       |       | Baltimore - 301 W. Preston St |
| Thomas-T Sui-T (T1001306)   | T1775 Management Associate      |       |       | Baltimore - 301 W. Preston St |

- Identify the employee you want, then click the Related Actions and Preview  icon next to the employee's name.

### Organization Members

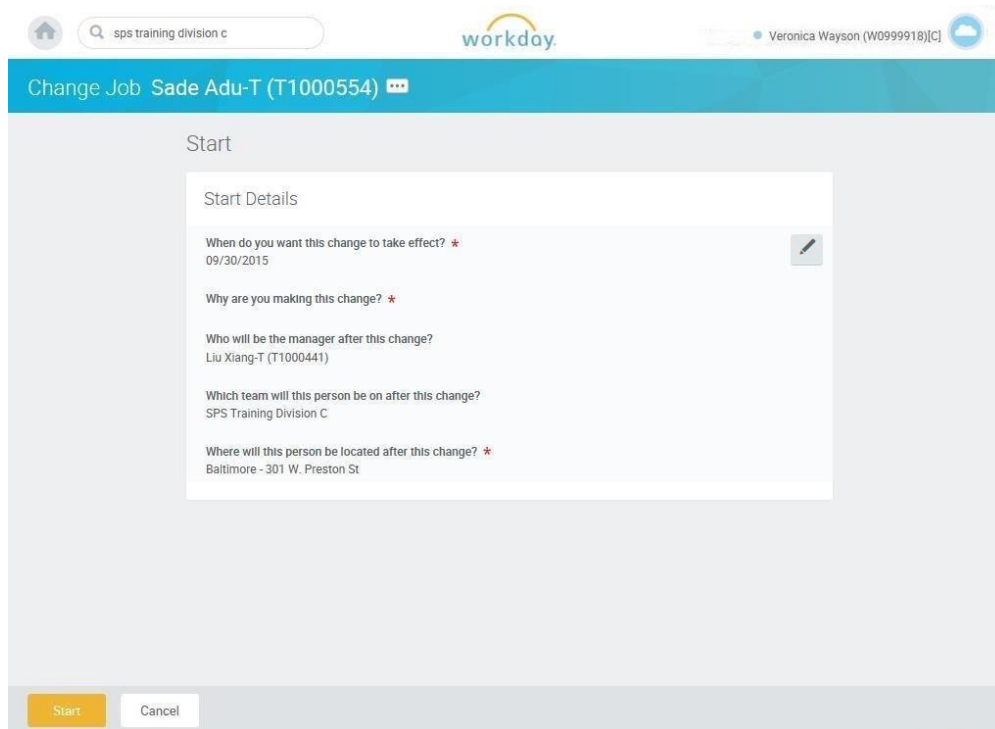



The screenshot shows the 'SPS Training Division' interface. The 'Members' tab is active, displaying a list of workers. A context menu is open over the 'Job Change' option, with 'Transfer, Promote or Change Job' highlighted. The worker's details are visible on the right side of the screen.

| Worker                      | Job Title                  | Location                      |
|-----------------------------|----------------------------|-------------------------------|
| Catherine Tate-T (T1000307) |                            |                               |
| Eric-T Cartman-T (T1001130) |                            |                               |
| Homer Simpson-T (T1000133)  |                            |                               |
| Nastia Liukin-T (T1000134)  |                            |                               |
| Sade Adu-T (T1000554)       |                            |                               |
| Songul Oden-T (T1000306)    | T2203 Admin Officer III    | Baltimore - 301 W. Preston St |
| The-T Judds-T (T1001025)    | T1593 Accountant           | Baltimore - 301 W. Preston St |
| Thomas-T Sul-T (T1001306)   | T1775 Management Associate | Baltimore - 301 W. Preston St |

6. In the menu, hover over the Job Change, and then click Transfer, Promote or Change Job.


## Change Job



7. Click the Edit  icon to update the following fields on the Start page, if applicable.
  - **When do you want the contractual conversion transfer to take effect?** (Enter the effective date.)
  - **Why are you making the change?** (Select Transfer – Contractual Conversion)
  - **Who will be the manager after the change?** (Enter manager’s name.)
  - **Where will this person be located after this change?** (Review/Enter Primary Job location or supervisory org)



**Information:** The supervisory org defaults from the manager selected. If the manager supervises more than one team, you will need to select the appropriate supervisory org.

8. Click the **Start**  button.
9. If an employee will have a new manager as a result of the job change, the Move Page displays.

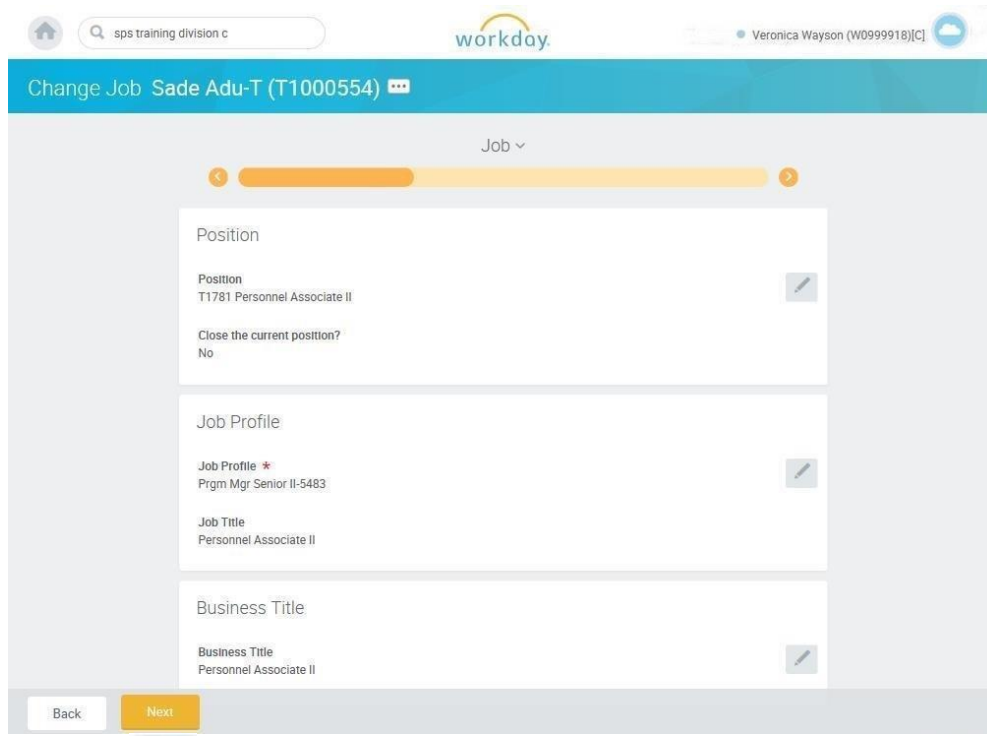
10. Click the Edit  icon to update the following field, if applicable:


- **What do you want to do with the opening left on your team** (Select from the drop-down menu)



**Information:** Always select “I plan to backfill this headcount” if you want the position that the employee is leaving to remain open.)

## Change Job



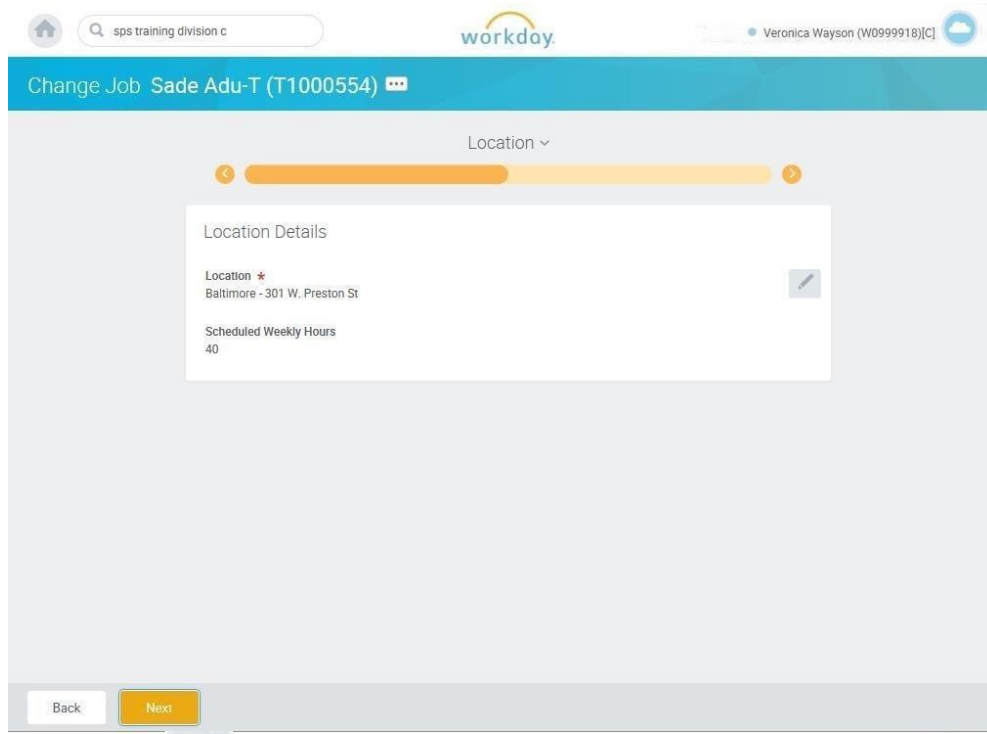
11. Click the Edit  icon to update the following fields on Job page, if applicable:


- **Position** (use the Prompt to select the State/Regular position number/name which the contractual is moving into)
- **Job Profile** (do not change; defaults from position selected)
- **Business Title** (change, if desired; NOTE: the business Title displays on the org chart)Working Title; defaults from position)

12. Click the **Next**  button.



## Change Job

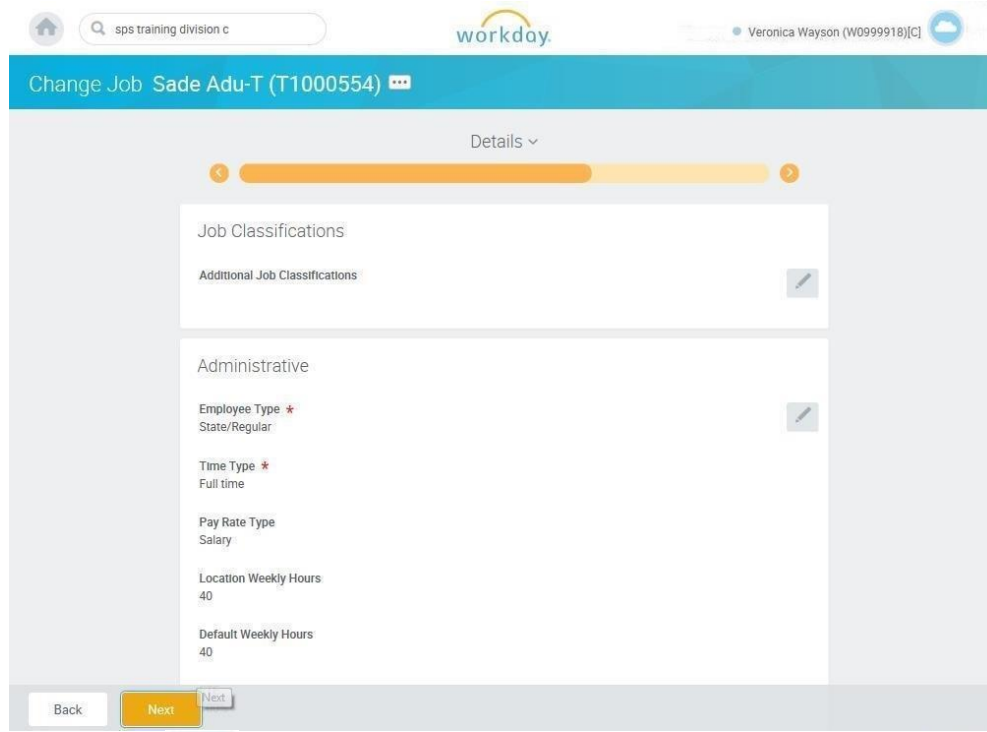



13. Click on the Edit  icon to update the following fields on Location page, if applicable:

- **Location** (defaults from the manager selected)
- **Scheduled Weekly Hours** (update if making an FTE change)

14. Click the **Next**  button.

## Change Job



15. Click on the Edit  icon in the Administrative section of the Details page to update the following field, if applicable:

- **Time Type** (example: part-time/full-time, for FTE changes; this may also default from the position selected).
- **Pay Rate Type** (example: salary/hourly).

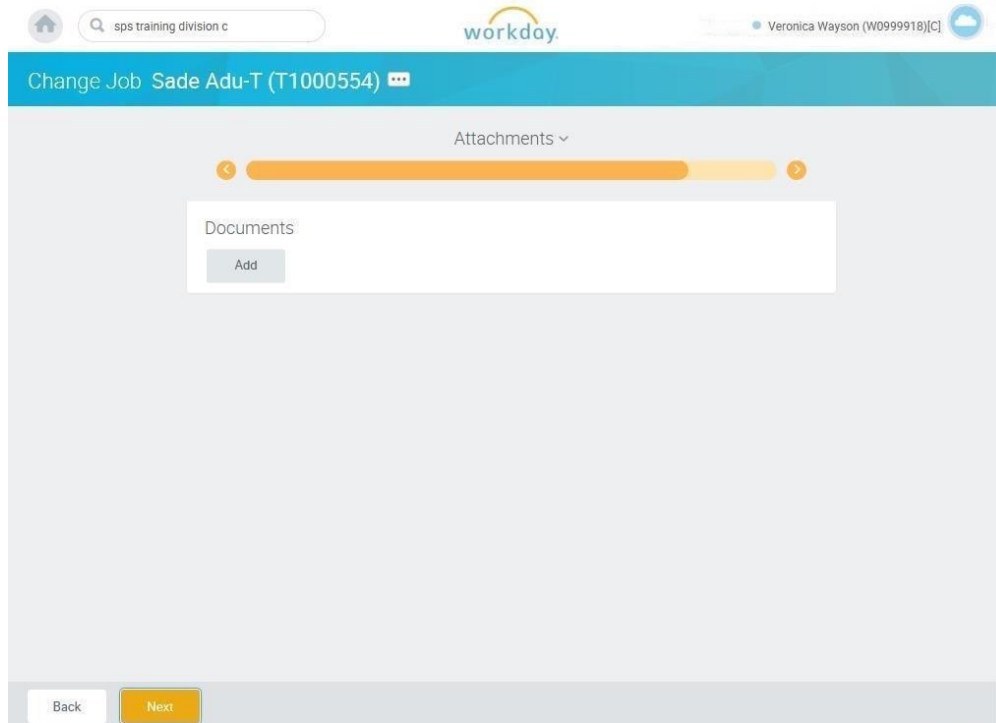
**Note:** The Time Type and Pay Rate are required fields.



**Information:** Do not update other fields on this page as they default from the position, job profile, or other sections.

16. Click the **Next**  button.

## Change Job



17. Click on the  button to add an attachment, if applicable.

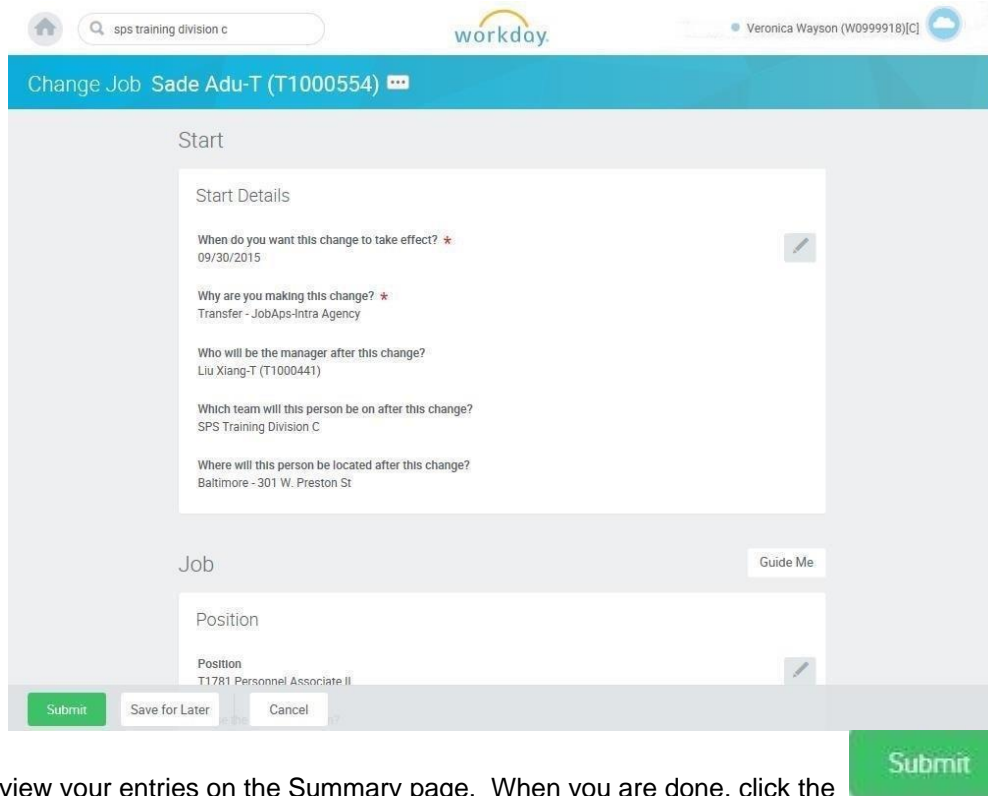
- Select the appropriate **Document Category**.
- Click the **Attach** button, browse and select a document to attach.



**Information:** Attach the MS-27 Salary Guideline Exceptions here when you go outside on the salary guidelines. You will update the employee's compensation on a later step in the Change Job Business process.

18. Click the **Next**  button.

## Change Job



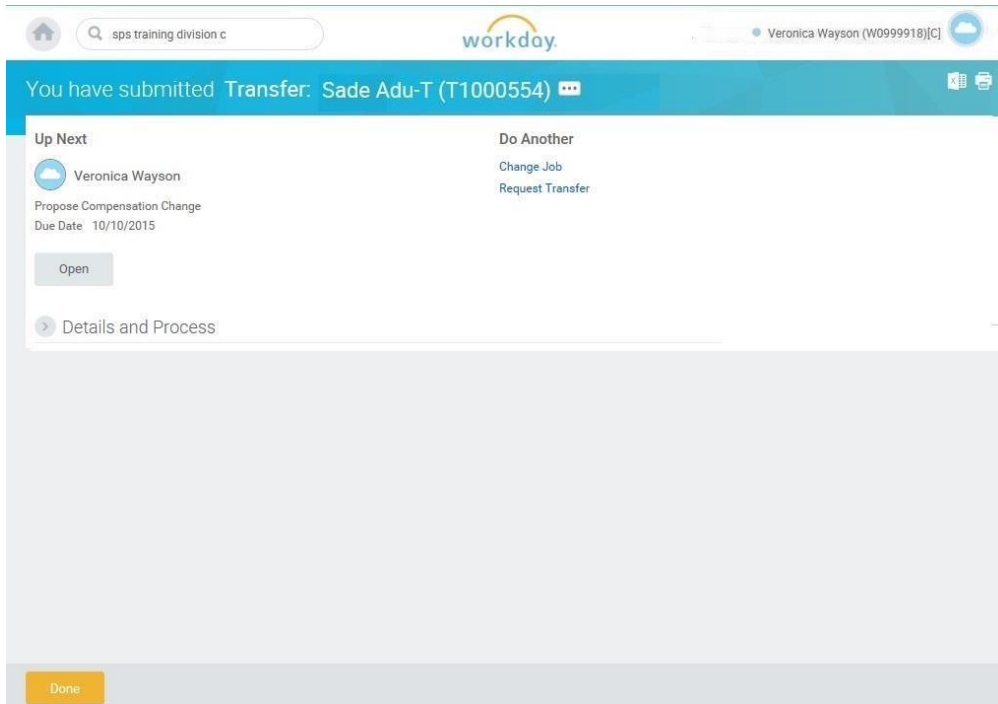
19. Review your entries on the Summary page. When you are done, click the  button.

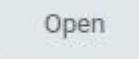


**Tip:** If you do not want to submit the request at this point, you can also click one of the following buttons:

- Click **Save for Later** to save your changes but not submit.
- Click **Cancel** to cancel the process and start at another time.

## Change Job




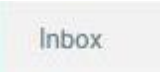
20. Click the Open  button to go to the next task, or click the Done button.

21. The System Task is complete.

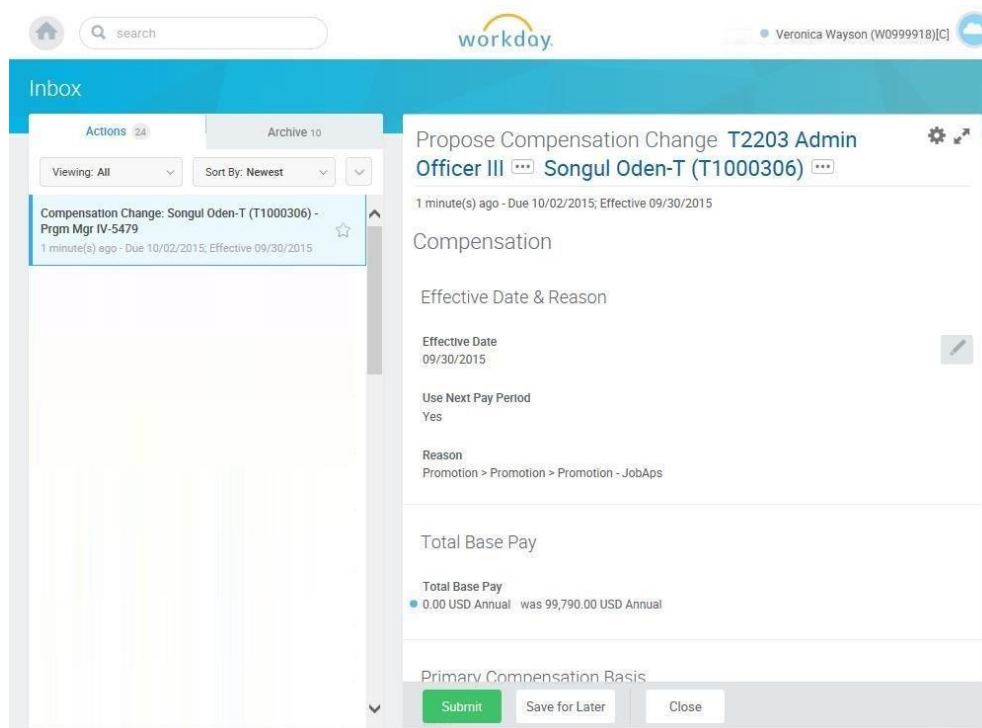
## Propose Compensation Change - Contractual Conversion


After the transfer for the contractual employee is submitted, the compensation for the employee must be adjusted from an hourly plan to a salary plan. Use the procedure below to complete the compensation change for the contractual conversion.

### Procedure:

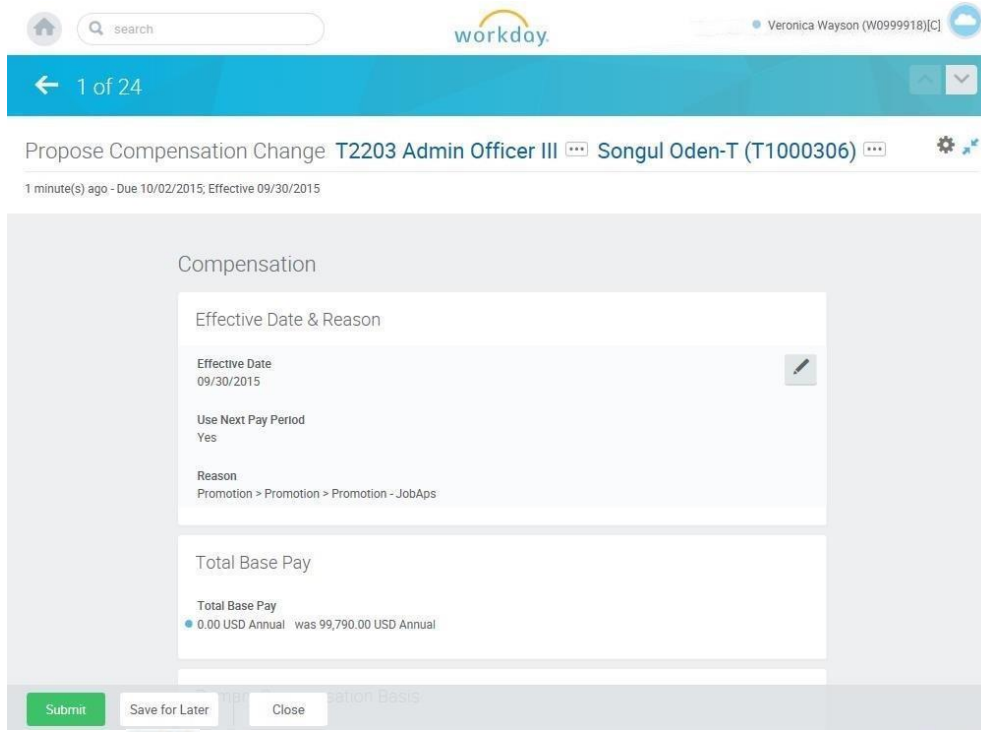
1. Click the **My Account**  icon in the top right corner of the page.
2. Click the **Inbox**  hyperlink.

### Inbox



3. In your Actions list, click the "Compensation Change" task. **HINT:** The employee's name is included in the task name.
4. Click the **Expand Inbox**  icon.

## Propose Compensation



5. Click the Edit  icon in the appropriate row to update the compensation.

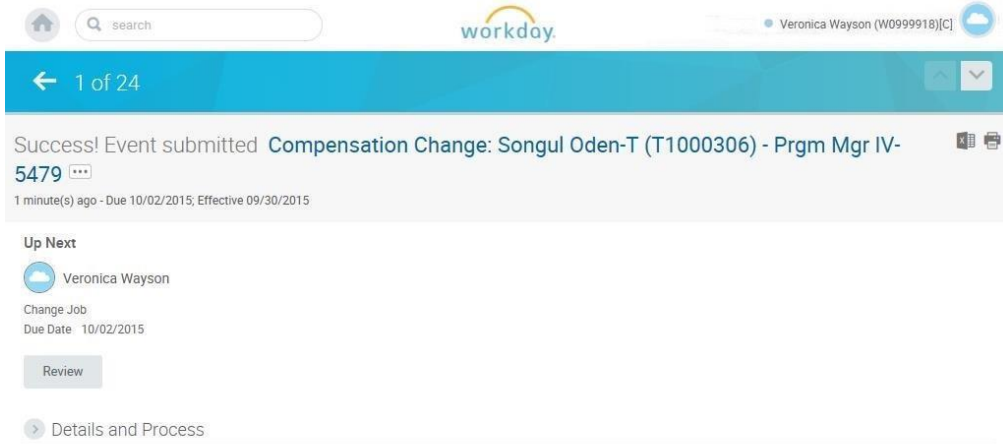


**Tips:**

- You may need to delete the **Contract “Not to Exceed Amount (NTE\$)** in the **Allowance** row (if it appears).
- Verify the **Total Base Pay**

6. Click the **Submit**  button.

## Propose Compensation Change



The screenshot shows the Workday interface. At the top, there is a search bar and the user's name, Veronica Wayson (W0999918)[C]. Below this is a navigation bar with a back arrow and '1 of 24'. The main content area displays a success message: 'Success! Event submitted Compensation Change: Songul Oden-T (T1000306) - Prgm Mgr IV-5479'. It also shows the submission time '1 minute(s) ago - Due 10/02/2015, Effective 09/30/2015'. Underneath, there is an 'Up Next' section for Veronica Wayson, with the task 'Change Job' and 'Due Date 10/02/2015'. A 'Review' button is visible. At the bottom, there is a 'Details and Process' link.

7. Click the **Done**  button.



**Information:** The compensation must be approved. The approval routing is based on the reason code selected when hiring the employee.



**Tip:** After completing a task in the business process you can view the next step.

- Click the drop-down arrow next to **Details and Process** to expand the section.
- Click the **Process** tab to see the path that the process will take.


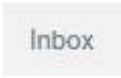
8. The System Task is complete.



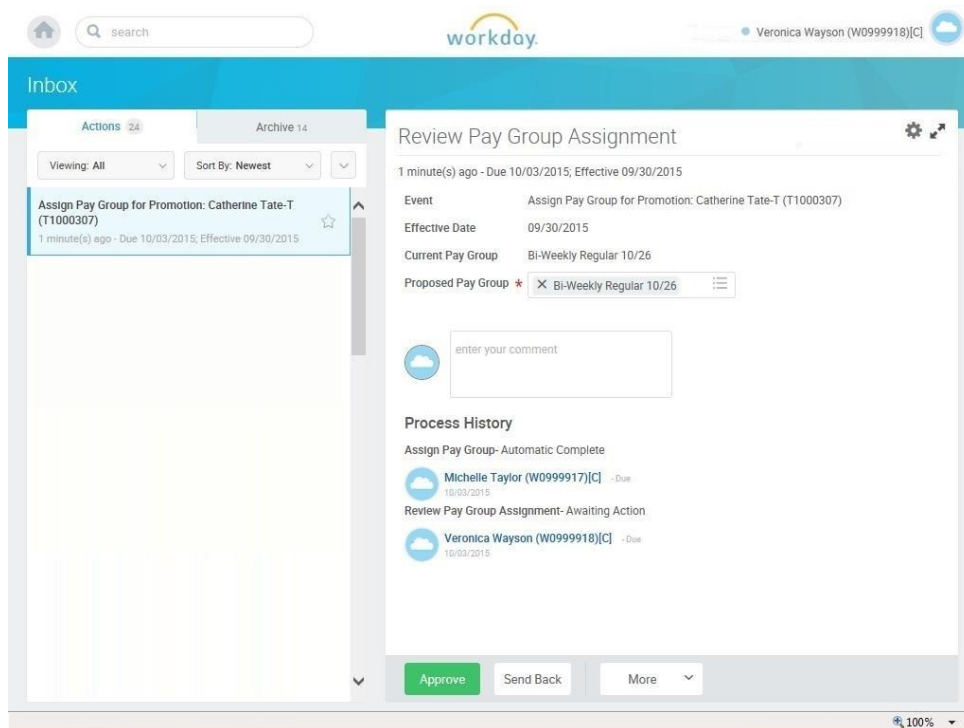
## Assign Pay Group - Contractual Conversion


After successfully transferring the contractual employee to a State/Regular position and updating the employee's compensation, change the pay group from a "Biweekly – Contractual" schedule to the appropriate State/Regular schedule. Use the procedure below to update the employee pay group.

### Procedure:

1. Click the **My Account**  icon in the top right corner of the page.
2. Click on the **Inbox**  hyperlink to view the action items in the inbox.

### Inbox



3. Click the appropriate task in your inbox. **HINT:** The task name includes "Assign Pay Group for...." and includes the worker's name and employee ID.
4. Click on the arrows  icon to expand the inbox.
5. Verify the default pay group. If needed, use the prompt to enter the Proposed Pay Group.




**Information:** The Proposed Pay Group is the defaulted pay group that is associated with the previous position. Review the pay group and modify it if necessary.

6. Click the **Approve**  button.

7. Click the **Done**  button.



**Tip:** After completing a task in the business process, you can view the next steps.

- Click the arrow  next to **Details and Process** to expand the section.
- Click the **Process** tab to see the path that the process will take.

8. The System Task is complete.

## Edit Other IDs - Contractual Conversion

After successfully transferring the contractual employee to a State/Regular position and updating the employee's compensation, add the "Contractual Conversion" designation to the employee's profile. Use the procedure below.

### Procedure:

1. Search for the employee.

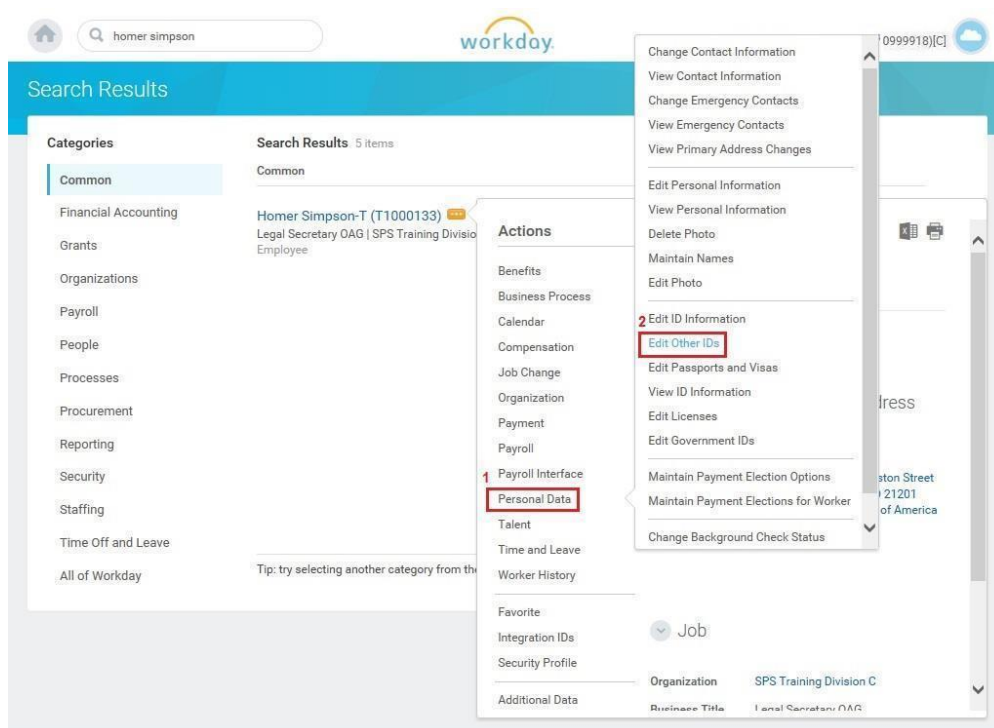


**Tip:** Use the search field to type the employee's name or employee ID OR type the employee's supervisory organization and search on the **Member's** tab.

You may also search for the employee as a To Do item in your inbox.

2. Click the Related Actions and Preview  icon next to the employee's name.

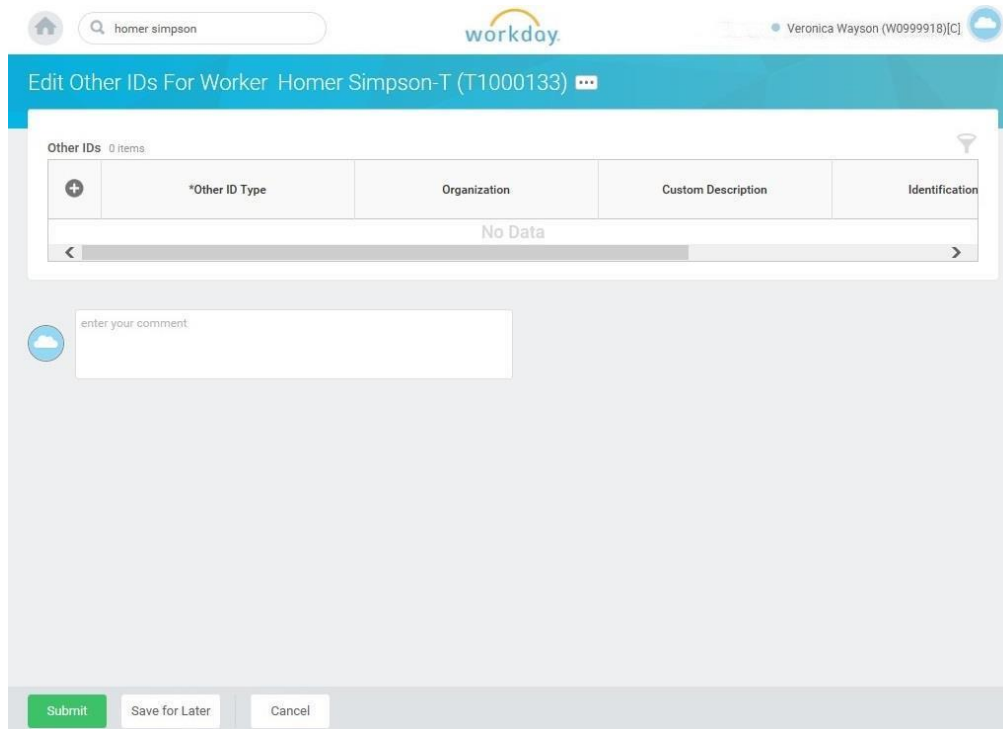
### Search Results






The screenshot shows the Workday interface with a search for 'homer simpson'. The search results list 'Homer Simpson-T (T1000133)' with a preview icon. A context menu is open over the preview icon, showing 'Personal Data' selected. A sub-menu is open for 'Personal Data', with 'Edit Other IDs' highlighted. The background shows a sidebar with categories like 'Common', 'Financial Accounting', 'Grants', etc., and a top navigation bar with the Workday logo.

3. In the menu, hover over Personal Date and then, click Edit Other IDs.

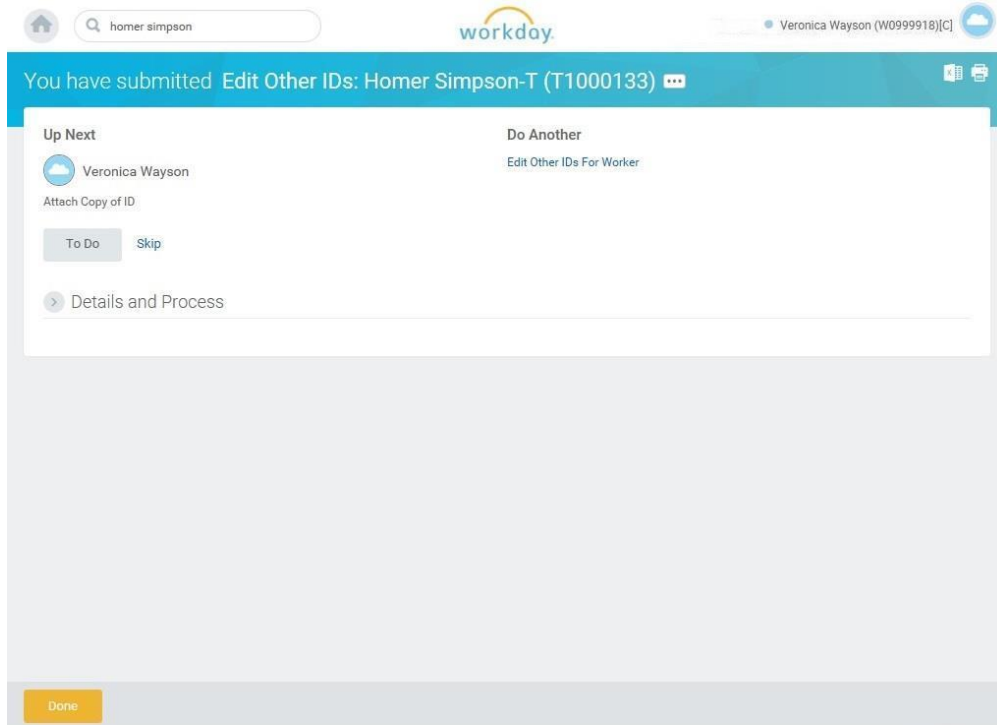
### Edit Other IDs For Worker



Workday interface showing the 'Edit Other IDs For Worker' page for Homer Simpson-T (T1000133). The page includes a search bar with 'homer simpson', a user profile for Veronica Wayson, and a table for 'Other IDs' with columns: \*Other ID Type, Organization, Custom Description, and Identification. The table is currently empty, displaying 'No Data'. Below the table is a comment field labeled 'enter your comment' and three buttons: Submit, Save for Later, and Cancel.

4. Type the worker's employee ID in the Identification # field.
5. On the Edit Other IDs for Worker page, click the Add Row  icon.
6. Click the **Other ID Type**  dropdown.
7. Click the **Contractual Conversion** item.
8. Enter a comment, if desired.
9. Click the **Submit**  button.

### Edit Other IDs For Worker

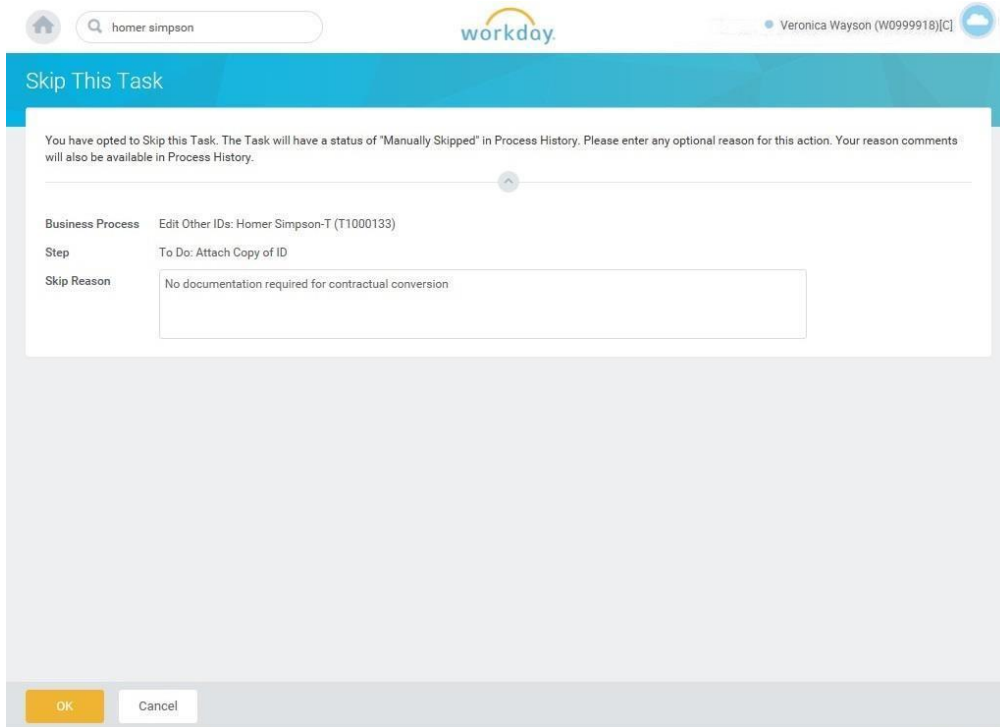


10. On the Up Next page, click the [Skip](#) hyperlink.



**Information:** Documentation is not required; you may skip this task.

## Skip This Task



home | homer simpson | workday | Veronica Wayson (W0999918)[C]

### Skip This Task

You have opted to Skip this Task. The Task will have a status of "Manually Skipped" in Process History. Please enter any optional reason for this action. Your reason comments will also be available in Process History.

Business Process: Edit Other IDs: Homer Simpson-T (T1000133)

Step: To Do: Attach Copy of ID

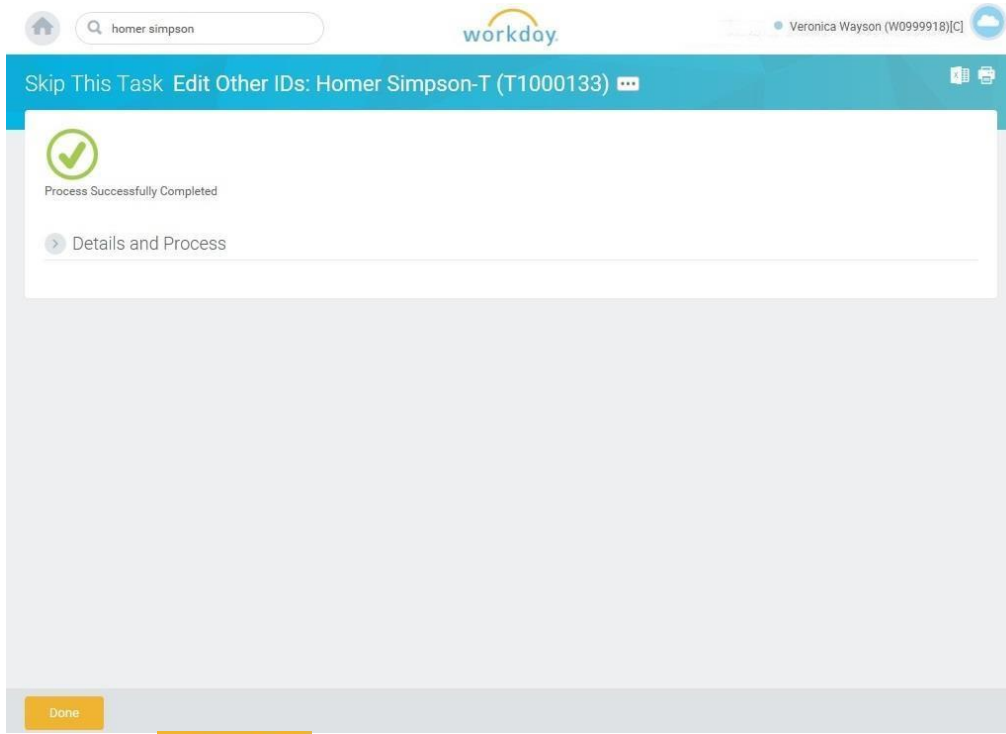
Skip Reason: No documentation required for contractual conversion

OK Cancel

11. Enter a reason for skipping the task in the Skip Reason field.

12. Click the **OK**  button.

### Skip This Task



13. Click the **Done** button.

14. The System Task is complete.

## Maintain Employee Contracts - Contractual Conversion

After adding the “contractual conversion” designator to the employee’s worker profile, the next task is to close any open contracts for the worker. Use the procedure below to close employee contracts.

### Procedure:

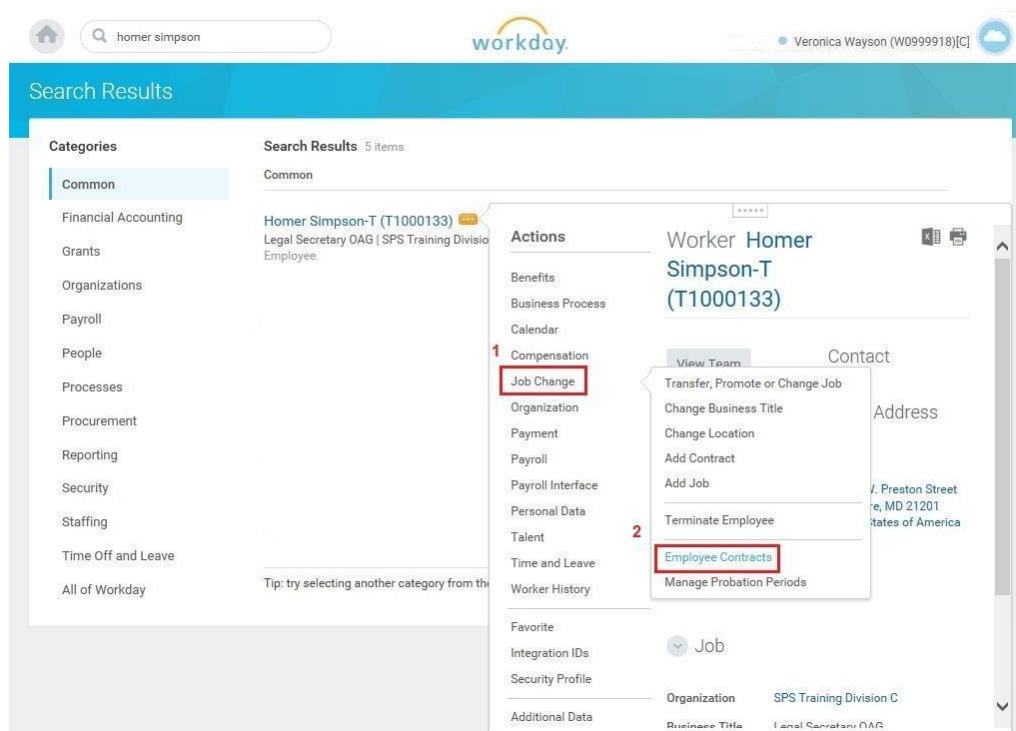
1. Search for the employee.



**Tip:** Use the search field to type the employee's name or employee ID OR type the employee's supervisory organization and search on the **Member's** tab.

2. Click the Related Actions and Preview  icon next to the employee's name.

### Search Results

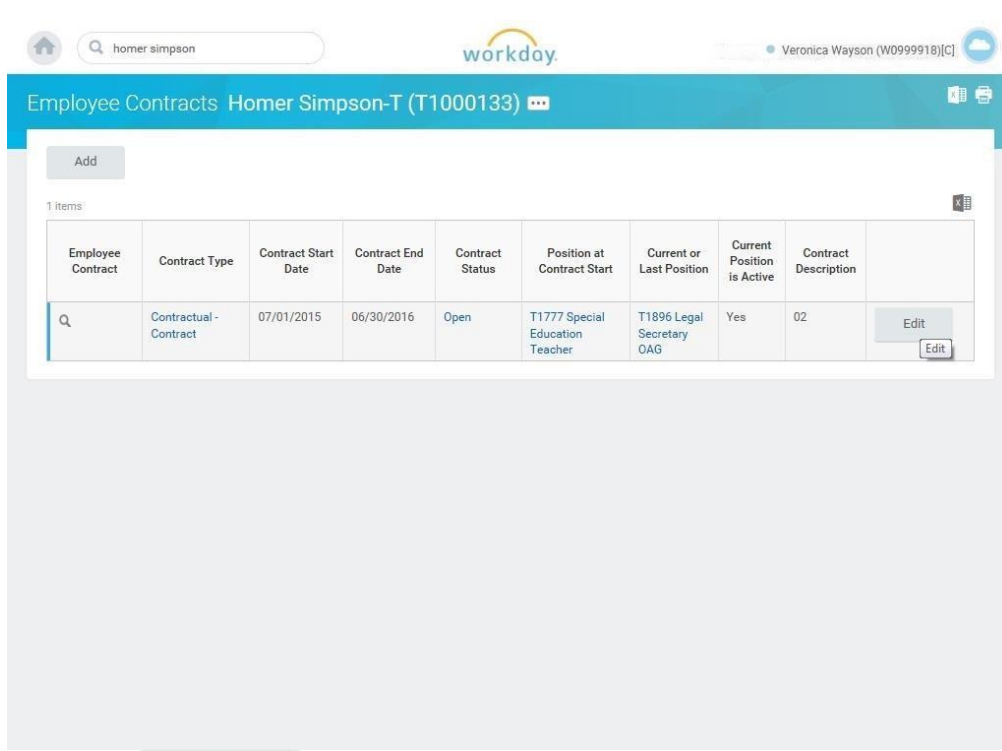


The screenshot shows the Workday interface with search results for 'Homer Simpson-T (T1000133)'. The 'Job Change' action is highlighted with a red box and a '1'. The 'Employee Contracts' action is highlighted with a red box and a '2'.

3. Hover over Job Change, and then click on Employee Contracts.



## Employee Contracts



Employee Contracts Homer Simpson-T (T1000133)

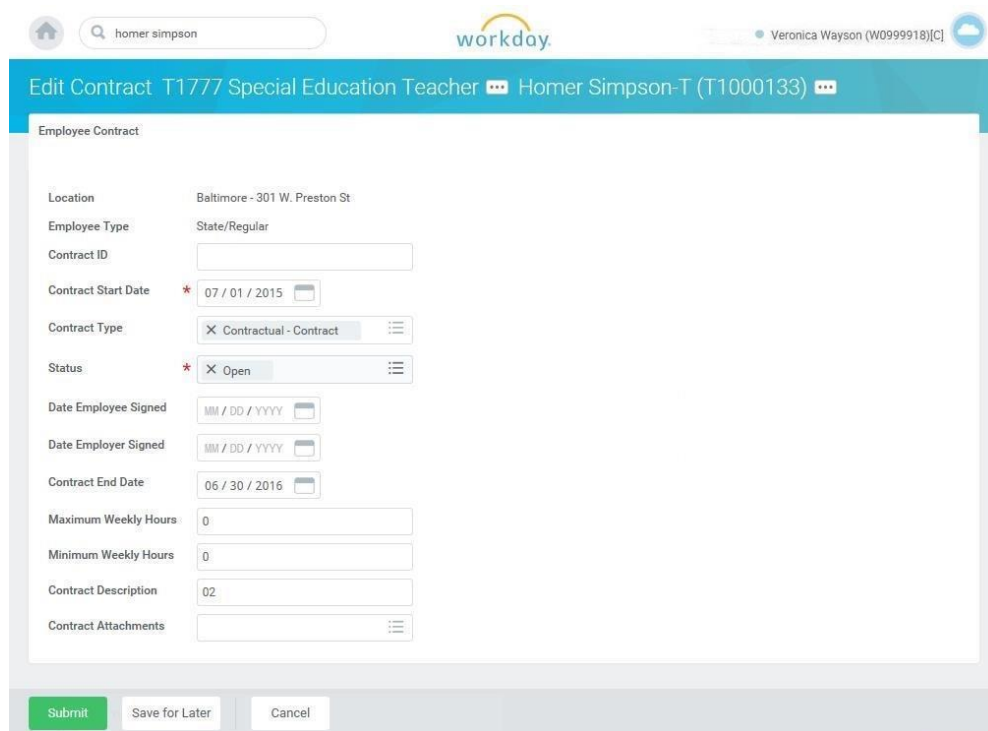
Add




1 items

| Employee Contract | Contract Type          | Contract Start Date | Contract End Date | Contract Status | Position at Contract Start      | Current or Last Position  | Current Position is Active | Contract Description |             |
|-------------------|------------------------|---------------------|-------------------|-----------------|---------------------------------|---------------------------|----------------------------|----------------------|-------------|
| Q                 | Contractual - Contract | 07/01/2015          | 06/30/2016        | Open            | T1777 Special Education Teacher | T1896 Legal Secretary OAG | Yes                        | 02                   | <b>Edit</b> |

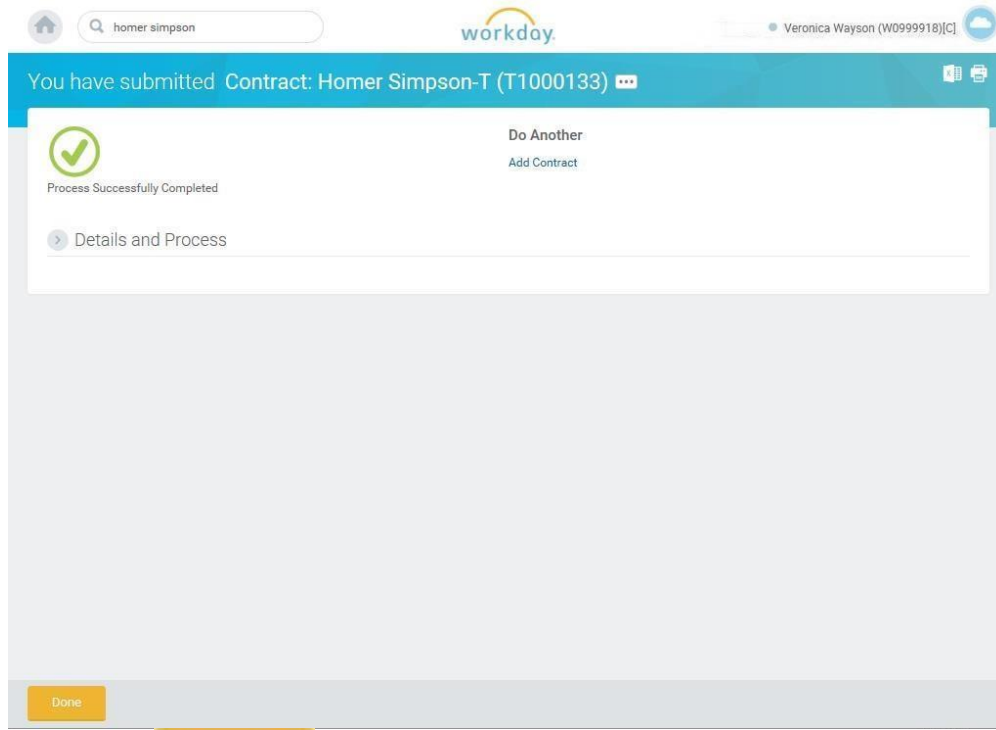
4. Click the **Edit** button.

## Employee Contracts



5. Click on the Prompt  icon to update the Status to "Closed".
6. Use the calendar  icon to update the Contract End Date, if applicable.
7. Click the **Submit**  button.

## Employee Contracts



8. Click the **Done** button.

9. The System Task is complete.