Contractual Conversion
(SPMS Agencies)

August 2016

Contents

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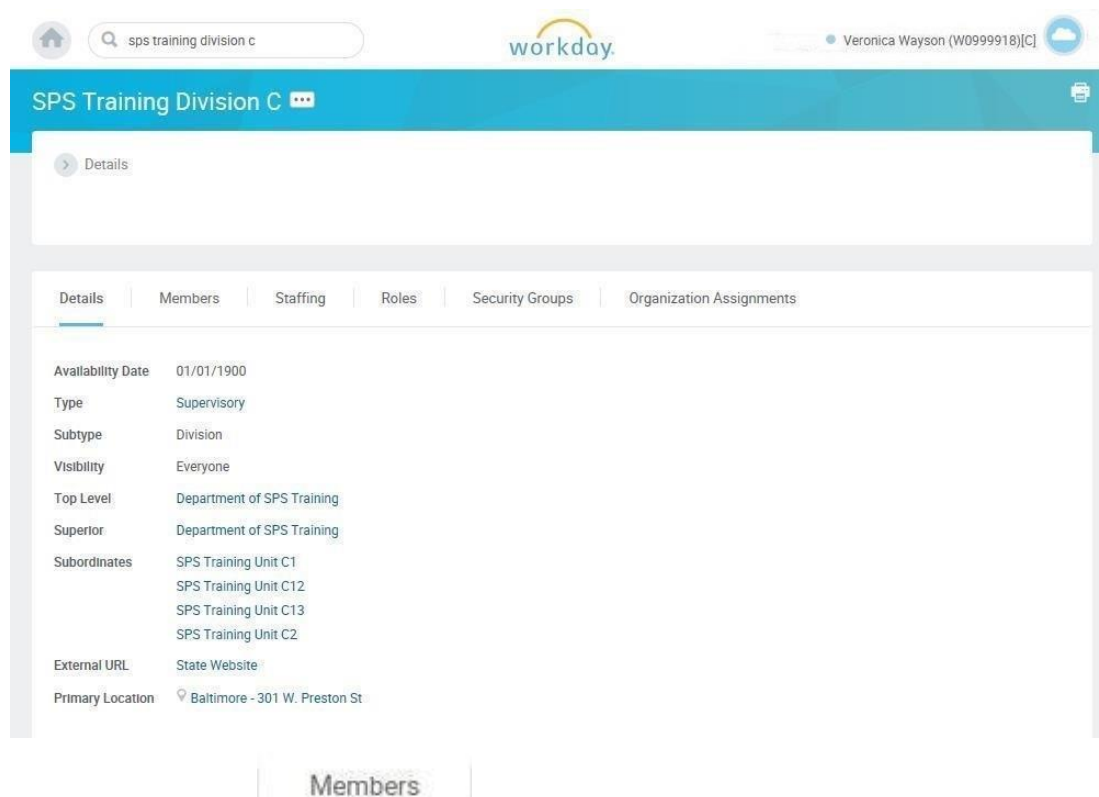
1. Type the Supervisory Organization name in the Search field.

   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** Q icon.

3. Click on the Supervisory Organization hyperlink.

   Supervisory Organization Details

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

Organization Members

5. Identify the employee you want, then click the Related Actions and Preview ⬚ icon next to the employee's name.
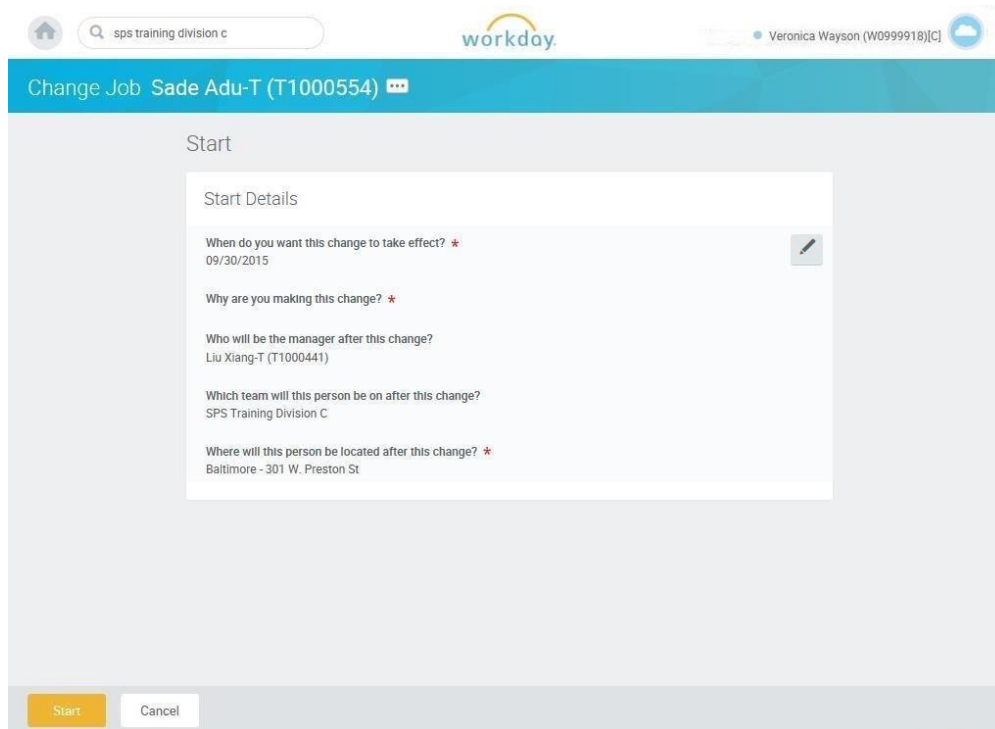
Organization Members

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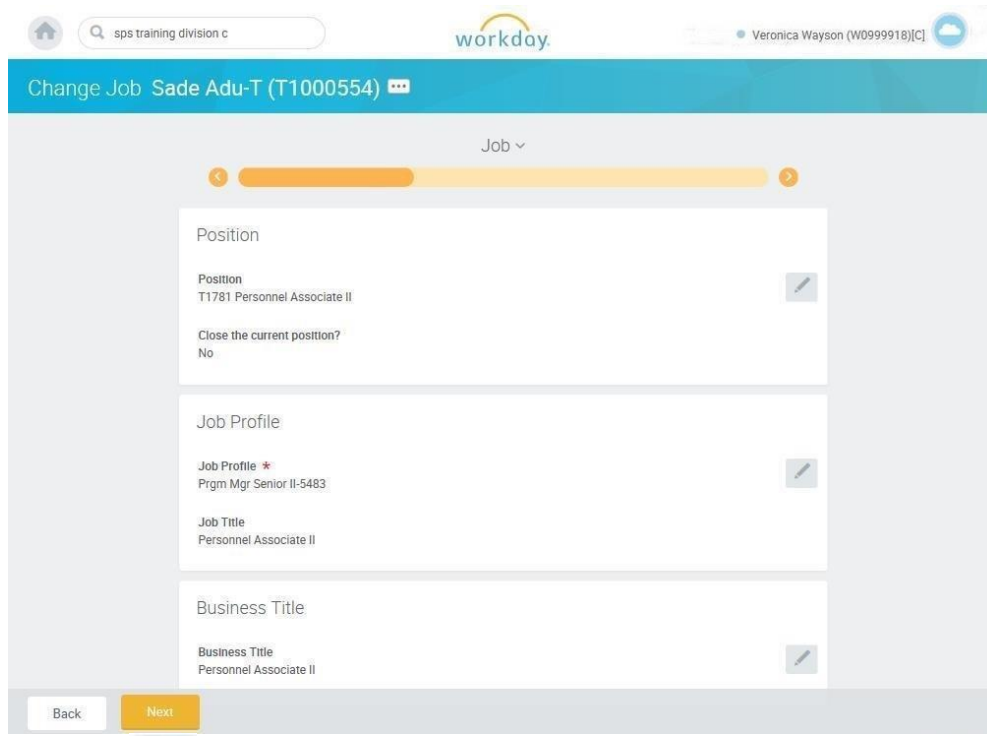
10. Click the Edit ✎ icon to update the following field, if applicable:

    - **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
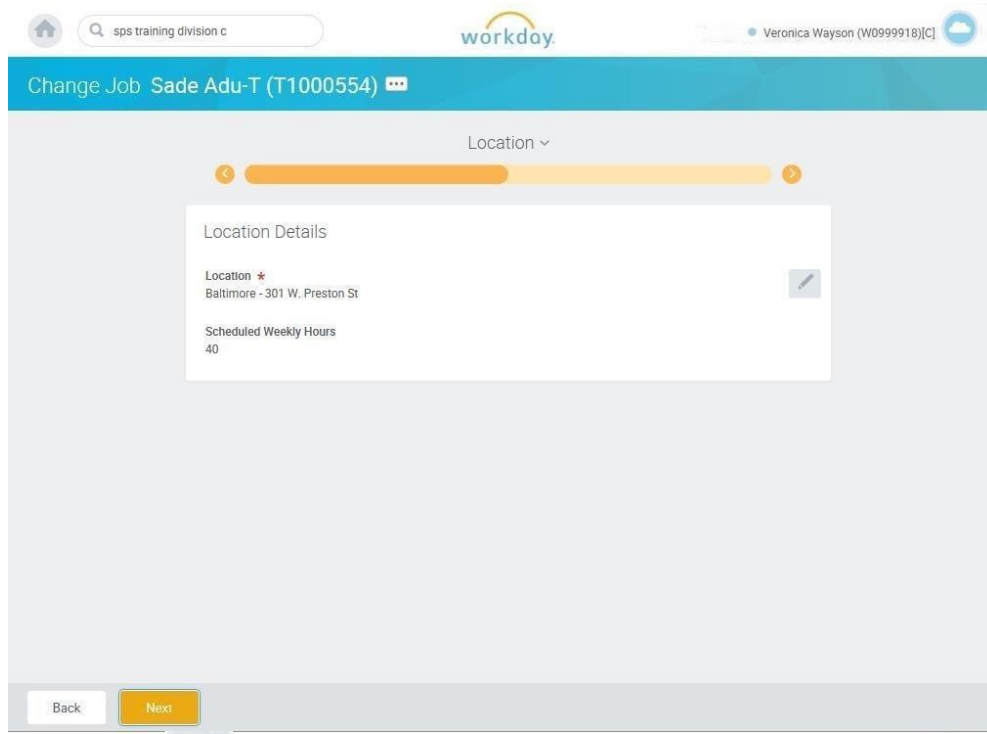
11. Click the Edit [pencil icon] icon to update the following fields on Job page, if applicable:

- **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)

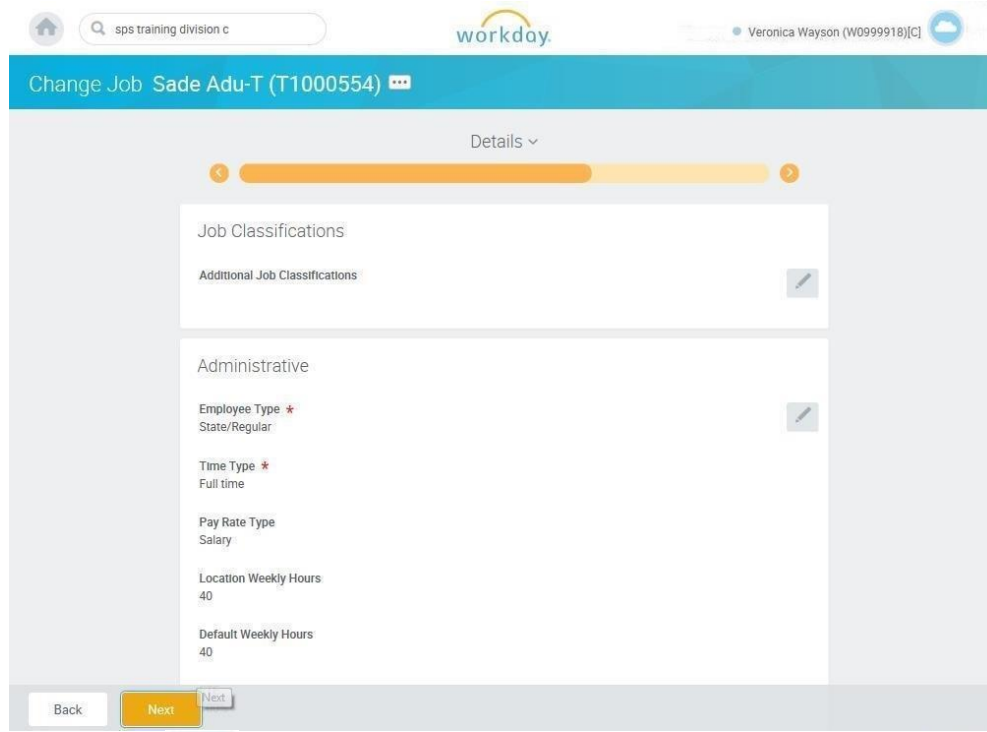12. Click the **Next** [Next button] button.

Change Job

13. Click on the Edit ![edit icon] 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** ![Next button] button.

Change Job

15. Click on the Edit ![icon] 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.
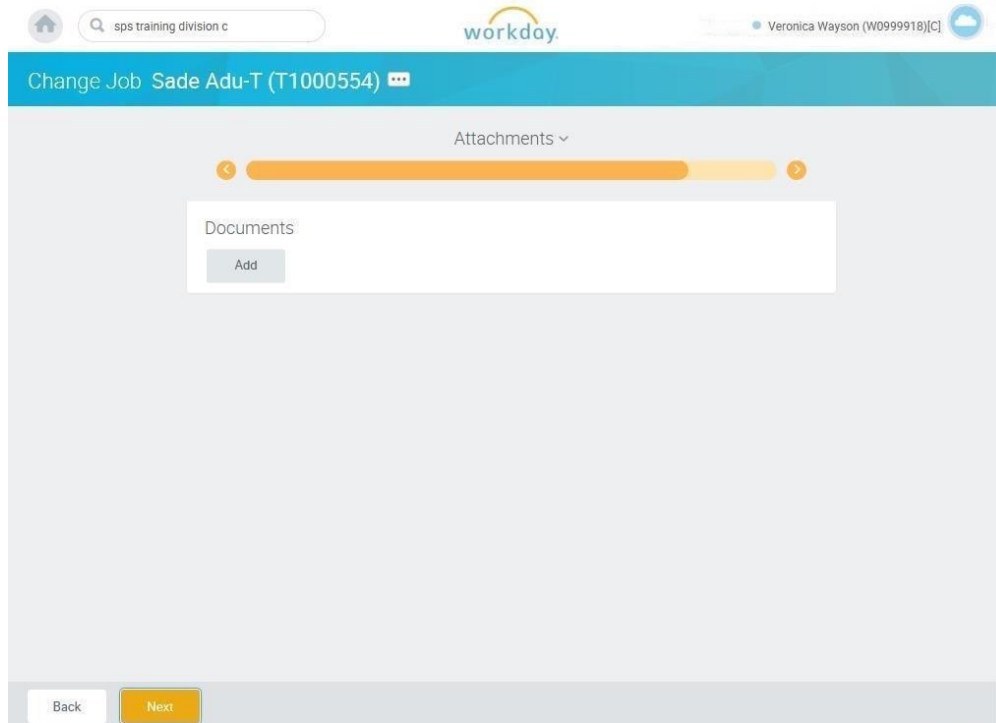- **Pay Rate Type** (example: salary/hourly).

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

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

16. Click the **Next** ![Next button] button.

Change Job

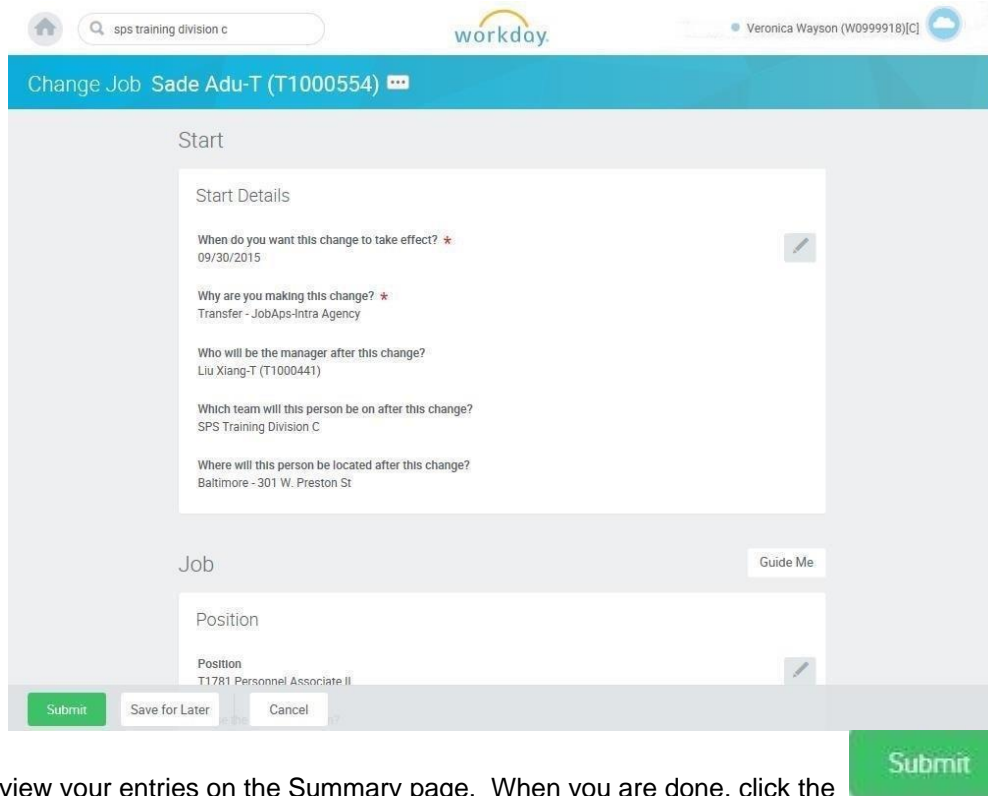17. Click on the [Add] button to add an attachment, if applicable.

- 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.
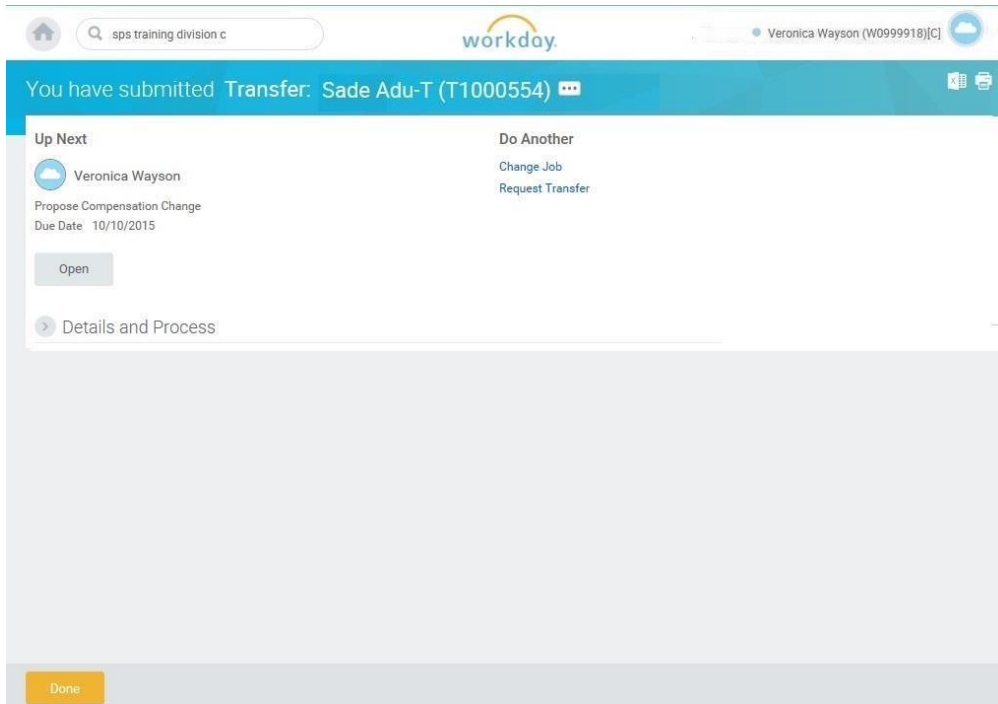
18. Click the **Next** [Next] button.

Change Job

19. Review your entries on the Summary page. When you are done, click the **Submit** button.
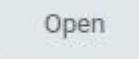
> **Tip:** If you do not want to submit the request at this point, you can also click one of the following buttons:
>
> - Click **Save for Later** to save your changes but not submit.
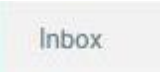> - Click **Cancel** to cancel the process and start at another time.

Change Job

20. Click the Open ![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.
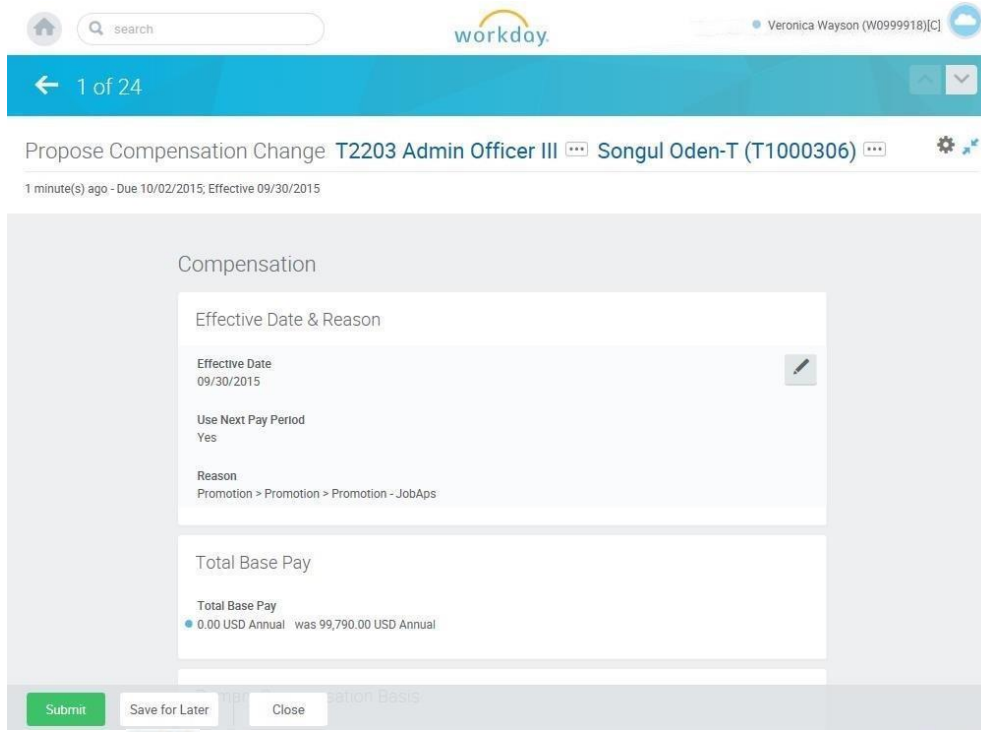
Procedure:

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

2. Click the **Inbox** hyperlink.

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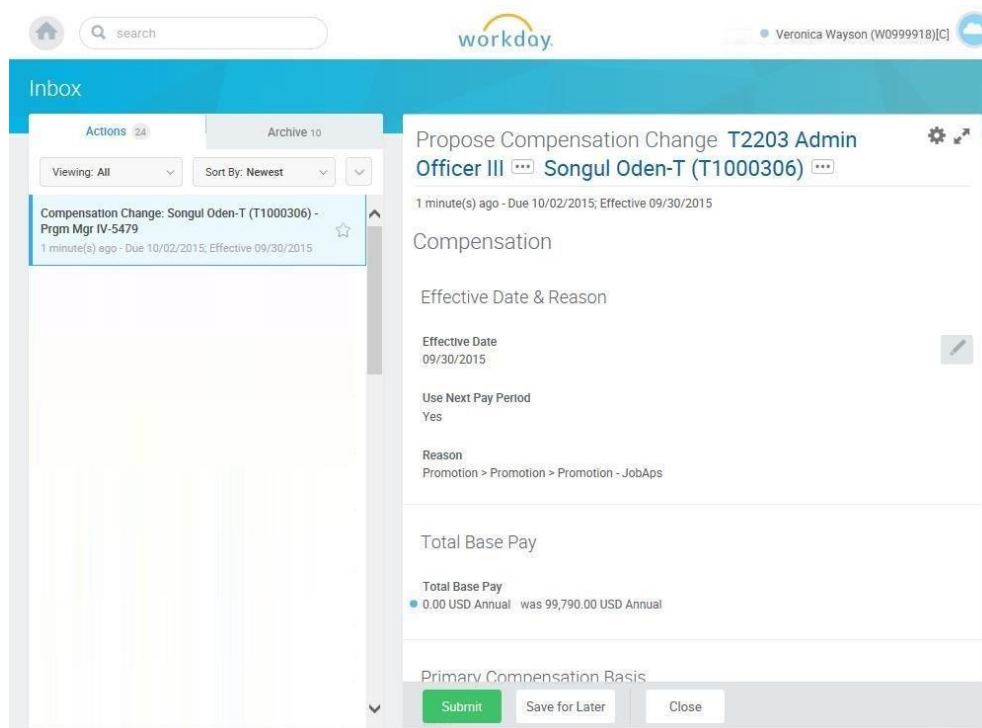
3. In your Actions list, click the "Compensation Change" task. **HINT**: The employee's name is included in the task name.

4. Click the **Expand Inbox** icon.

Propose Compensation

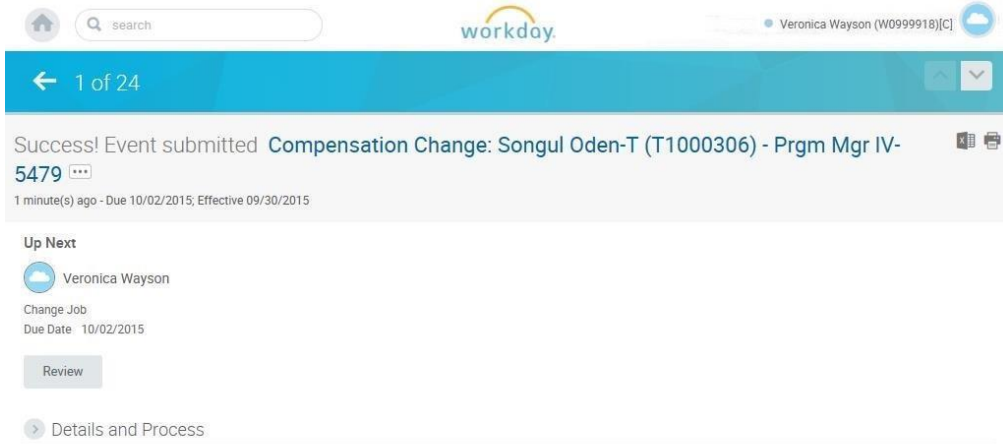5. Click the Edit icon in the appropriate row to update the compensation.

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

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.
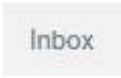- Click the **Process** tab to see the path that the process will take.

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 **Inbox** hyperlink to view the action items in the inbox.

Inbox
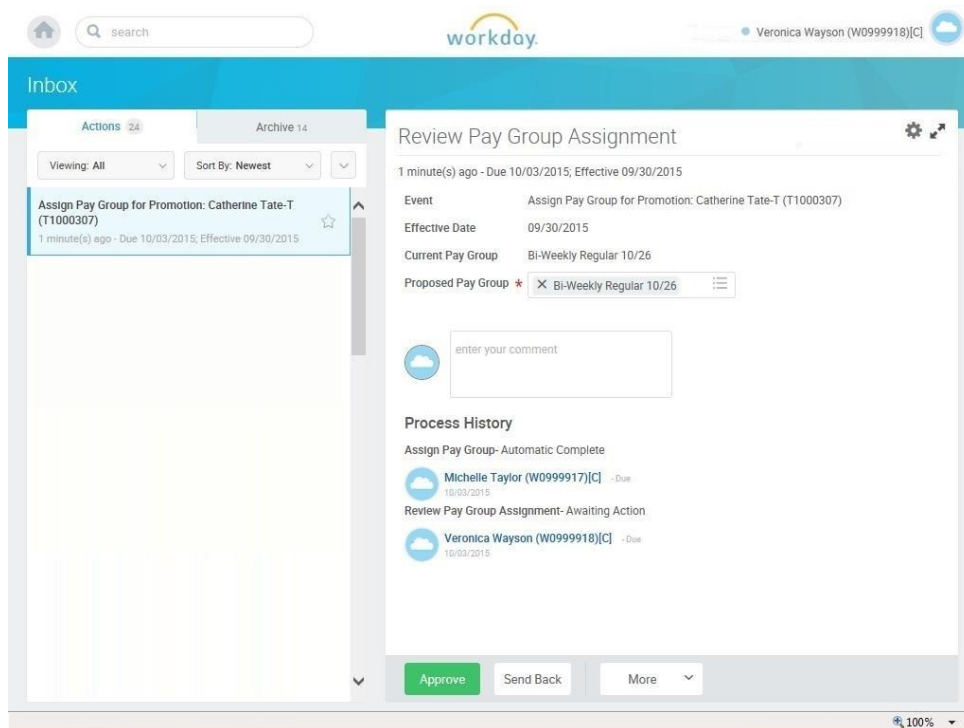
3. Click the appropriate task in your inbox. **HINT:** The task name includes "Assign Pay Group for...." and includes the worker's name and employee ID.

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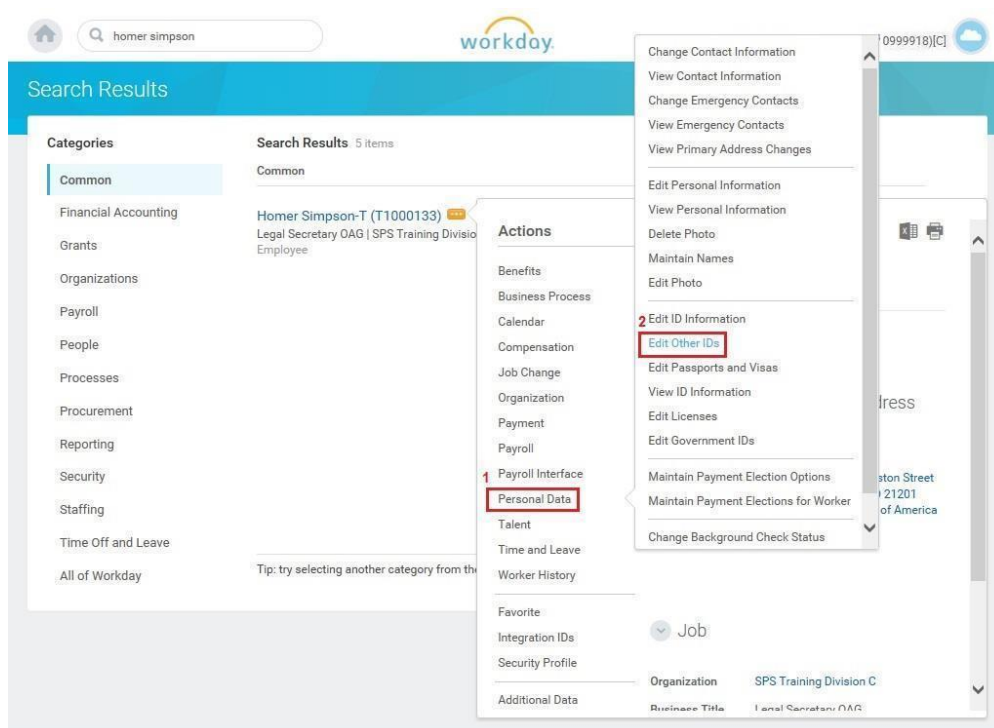
    Tip: Use the search field to type the employee's name or employee ID OR type the employee's supervisory organization and search on the **Member's** tab.

    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.
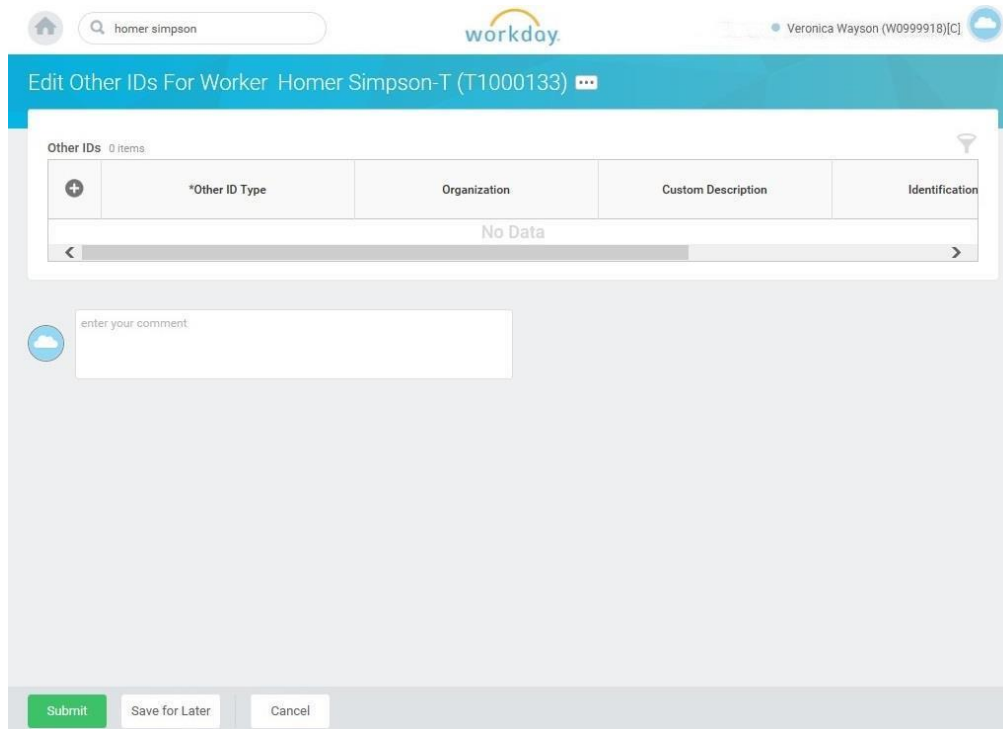
    Search Results

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

Edit Other IDs For Worker

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** Submit button.
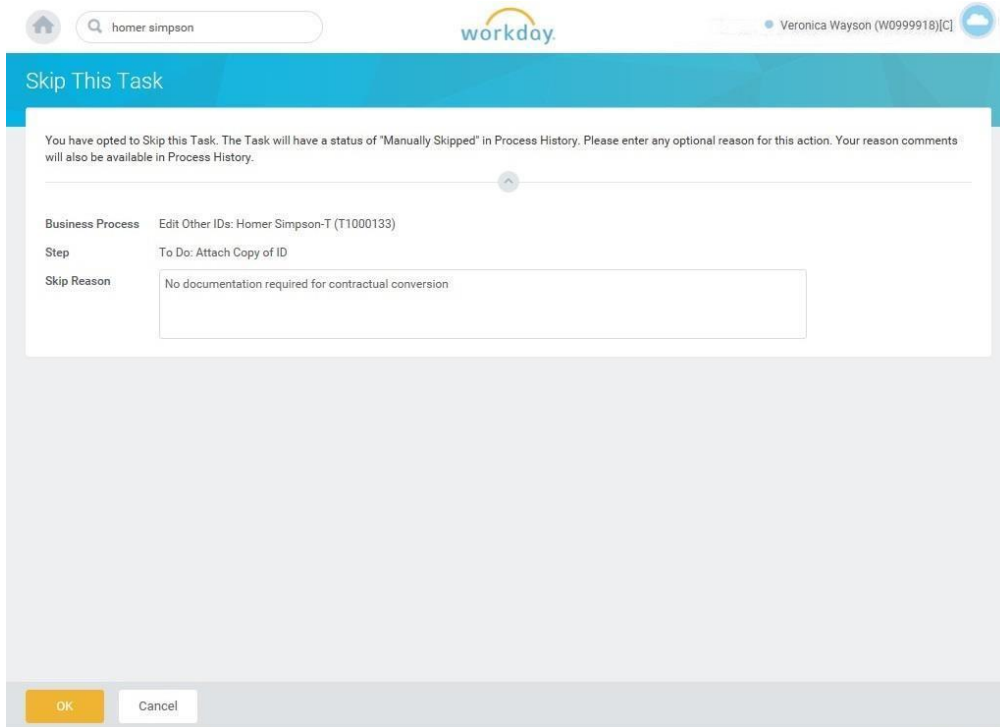
Edit Other IDs For Worker
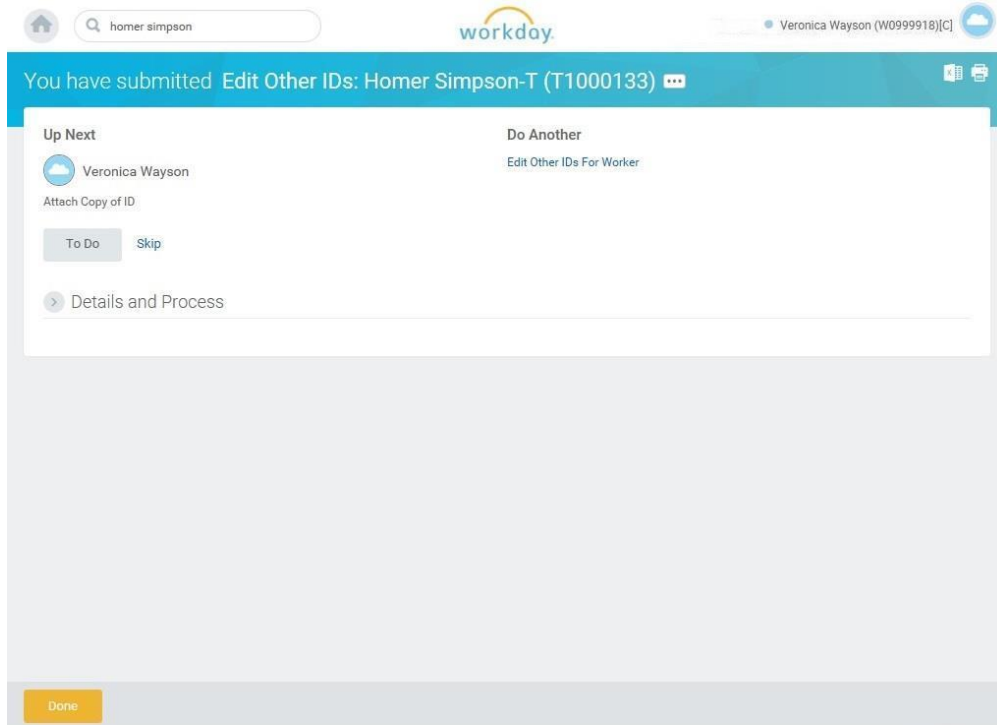
10. On the Up Next page, click the Skip hyperlink.

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

Skip This Task

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

12. Click the **OK** button.

Skip This Task
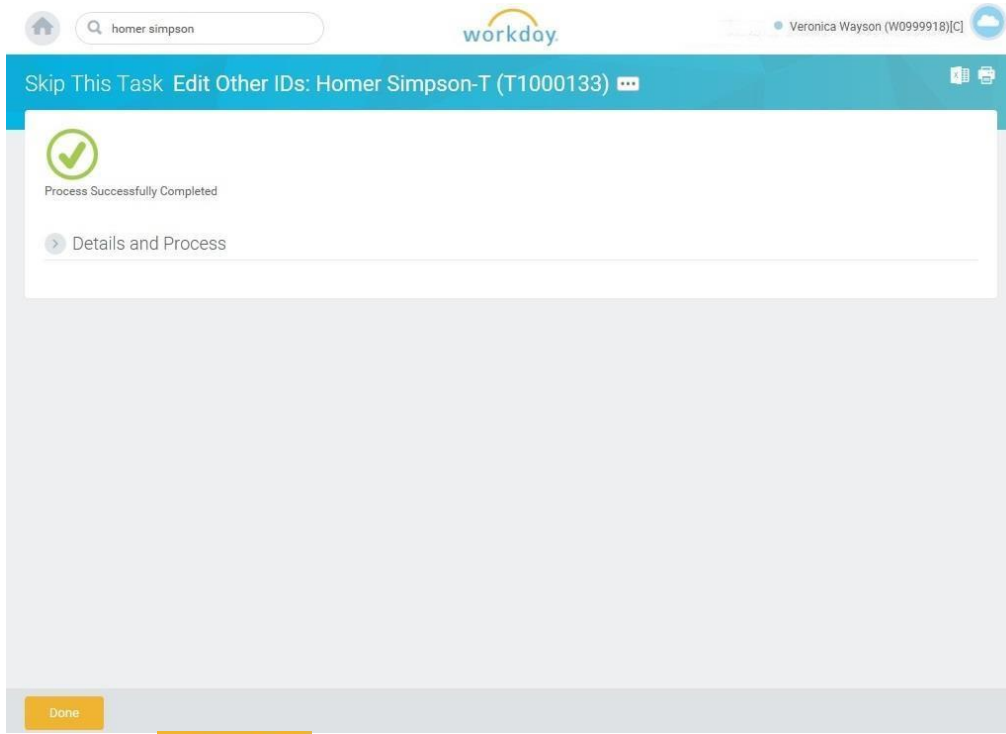
13. Click the **Done** ![Done] button.

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.
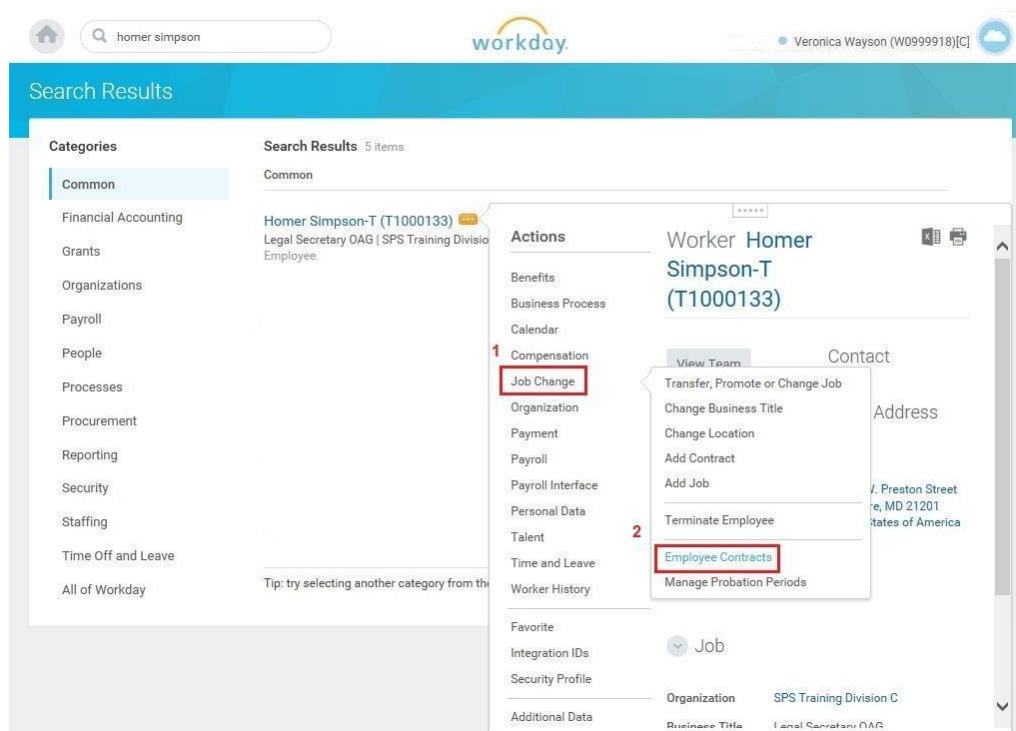
1. Search for the employee.

> **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.
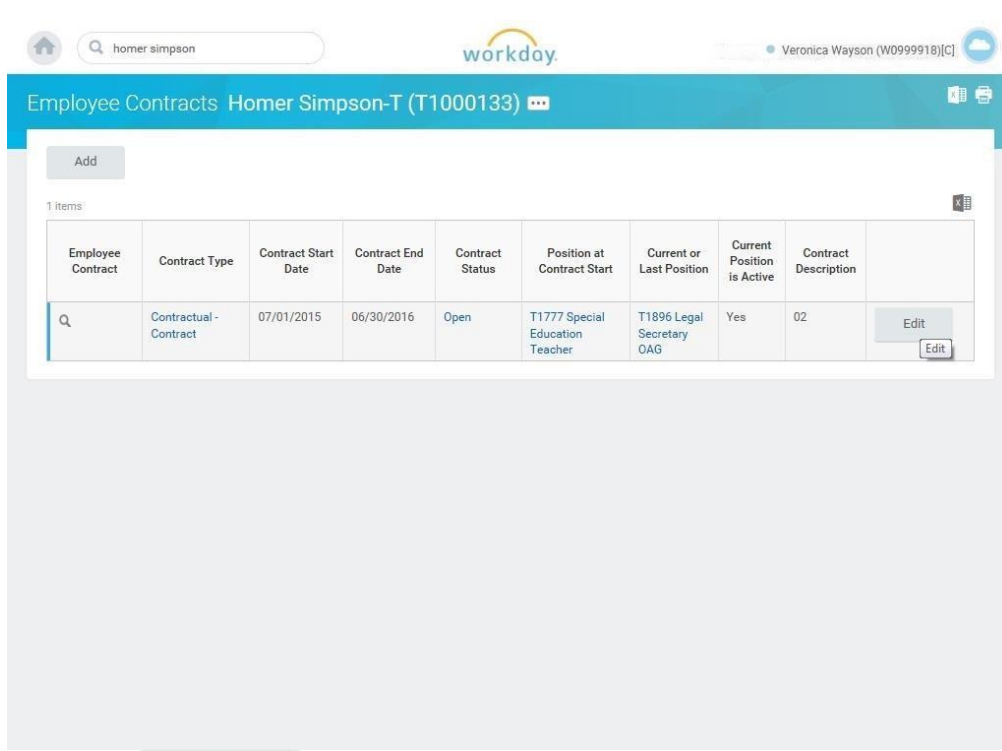
   Search Results

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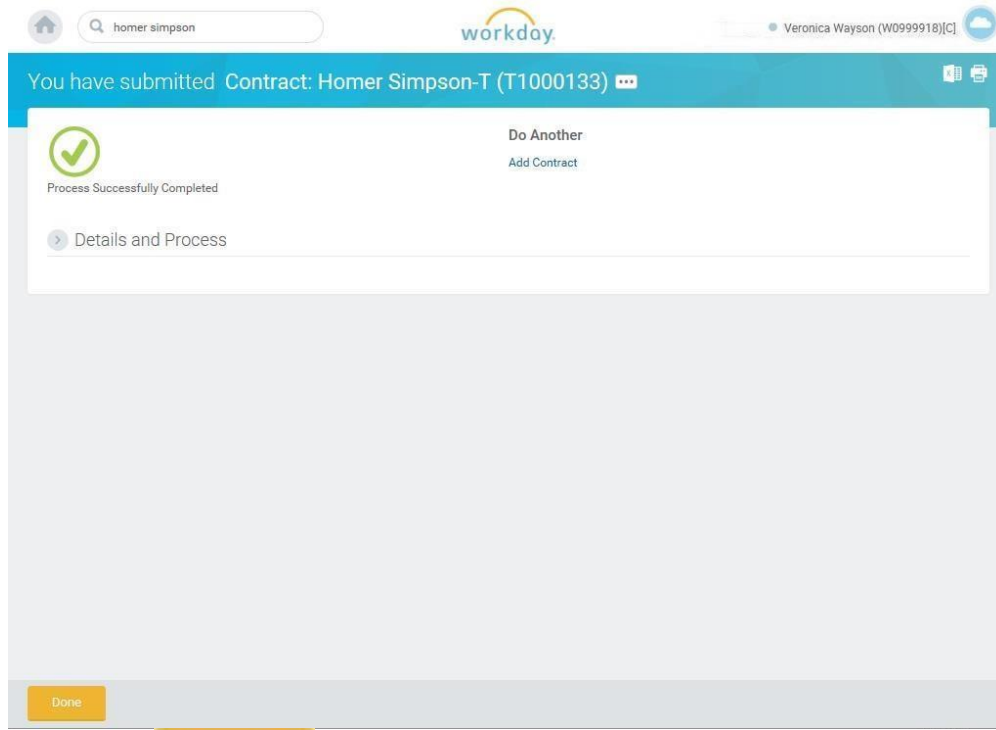
Employee Contracts

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.