



STATEWIDE PERSONNEL
— S Y S T E M —

Change Job - Transfer

January 2021



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Change Job – Transfer Business Process

Process Overview

The Change Job process is used to transfer employees from one supervisory organization to another within or outside of an Agency. Transfers can be initiated in two ways:

- From a recruitment in JobAps or
- In Workday by an HR Coordinator, for Reassignments and transfers to independent Agencies.

For transfers initiated from JobAps, the hiring agency will initiate the worker transfer.

For a Reassignment, a position must be “available to fill” in the supervisory organization (i.e., someone must be vacating the position or it must be otherwise unfilled” that the employee is being transferred into.

The steps in the Change Job – Transfer business process are listed in the table below. It includes the process steps, the role that performs the task and the description.

Process Steps	Role	Description
Initiate Transfer in JobAps via the Hire Details Page*	Recruiter (Proposed Agency)	Complete the Hire Details Page, including: <ul style="list-style-type: none"> - Action = Transfer - Ensure the W# for the worker has been automatically populated - Start Date = the effective date of the transfer - Position = The Workday position number the worker is being transferred into
Initiate Change Job – Transfer in Workday*	HR Coordinator (Current or Proposed Agency)	Enter job change data in Workday, including: <ul style="list-style-type: none"> - New manager and supervisory organization - Reason (see Events and Reasons section) - New position - Other job details, as needed
Review JobAps Data*	HR Coordinator (Proposed Agency)	Review job change data from JobAps, including: <ul style="list-style-type: none"> - New manager and supervisory organization - Reason (see Events and Reasons section) - New position - Other job details, as needed
Proposed Compensation	HR Coordinator (Proposed Agency)	**If non-conversion reason is used, this step will be triggered*** <ul style="list-style-type: none"> - Need to change salary to hourly or hourly to salary - Ensure all comp lines are correct based on docs
Agency Job Change Approvals*	HR Partner (Proposed Agency)	Agency HR Director approval of the transfer
	Appointing Authority (Proposed Agency)	Agency Appointing Authority approval of transfer
Role Assignment to Dos*	HR Coordinator (Current Agency)	Determine if the worker has roles that need to be reassigned. Assign roles to another worker, if applicable.
	HR Coordinator (Current Agency)	Review user-based security assignments, if applicable
Assign Pay Group*	HR Coordinator (Proposed)	Assign pay group for the job change. NOTE: If the employee has multiple jobs, assign pay



NOTE: Some tasks (marked with asterisk {*}) in the Change Job process are not always required due to the reason selected for the job change or other conditions.

Events and Reasons

You will select one of the following reasons when initiating a job change on a worker.

Event	Reason	Description
Transfer	Transfer – Contractual Conversion	Transfer an employee from a contractual Position to a State/Regular Position (per conversion guidelines)
	Transfer – (Non-conversion)	Transfer an employee (when conversion guidelines are not met) from a contractual Position to a State/Regular Position or from a State/Regular Position to a contractual position or contractual position to a new contractual position with a change in compensation (triggers a compensation step)
	Transfer – End of Temporary Duty	End the 6 months temporary duty (e.g., temporary employee).
	Transfer – Independent Agency	Transfer an employee to a CPBI Agency in Workday.
	Transfer – Intra Agency	Transfer an employee to a supervisory organization within the same Agency in Workday
	Transfer – JobAps-Independent Agency	Initiate an employee transfer to a CBPI Agency through JobAps
	Transfer – JobAps-Intra Agency	Initiate an employee transfer to a supervisory organization within the same Agency through JobAps
	Transfer - JobAps-Other Agency	Initiate an employee transfer to another SPMS Agency through JobAps
	Transfer – Other Agency	Initiate an employee transfer to another SPMS Agency through Workday
	Transfer – Reassignment in Same Agency	Transfer an employee reassignment to another position and supervisory organization within the same Agency in Workday.
	Transfer - Temporary Duty	Transfer an employee to a 6 months temporary employment (e.g., temporary employee).

Before you begin...

You will need the following information to complete the process:

- Supervisory Organization
- Employee's name or employee ID
- Proposed manager and related Supervisory Organization (if being moved to a different team)
- Effective Date of Transfer
- Position ID/Name
- Job Profile
- Employee's Job Title

HINT: Use the SPMS View All Positions Report to identify positions and corresponding workers, supervisory orgs, FTE % and other details to assist with the job change.



NOTE: In JobAps, there is no field to narrow down transfer reasons; this is done in Workday

*If you need to complete a compensation change on a transfer processed in JobAps (not contractual conversion), once it is integrated to Workday:

- 1) In Workday, remove the "Transfer" reason for the transfer.
- 2) Select the "Transfer (Non-conversion)"

The correct Transfer reason is critical, because it impacts benefits and pay for the employee.

Employee type of Transfer:	Pay change/type required?	Transfer Reason
Contractual to State/Regular (Contractual Conversion)	Y	Contractual Conversion - specific State policies must be met to use this reason. Please refer to the Transfer Job Aid for details.
Contractual to (State/Regular or Temporary)	Y	Transfer (Non-conversion)
Contractual to Contractual	N	<ul style="list-style-type: none"> • End of Temporary Duty • <u>Indep Agency (JobAps)</u> • Intra Agency (JobAps) • Other Agency (<u>JobAps</u>) • Reassignment in Same Agency • Temporary Duty
Contractual to Contractual	Y	Transfer (Non-conversion)
State/Regular to (Contractual or Temporary)	Y	Transfer (Non-conversion)
State/Regular to State/Regular	N	<ul style="list-style-type: none"> • End of Temporary Duty • <u>Indep Agency (JobAps)</u> • Intra Agency (JobAps) • Other Agency (<u>JobAps</u>) • Reassignment in Same Agency • Temporary Duty
Temporary to (Contractual or State/Regular)	Y	Transfer (Non-conversion)




Review Transfer Initiated by JobAps

(Completed by Proposed HR Coordinator)

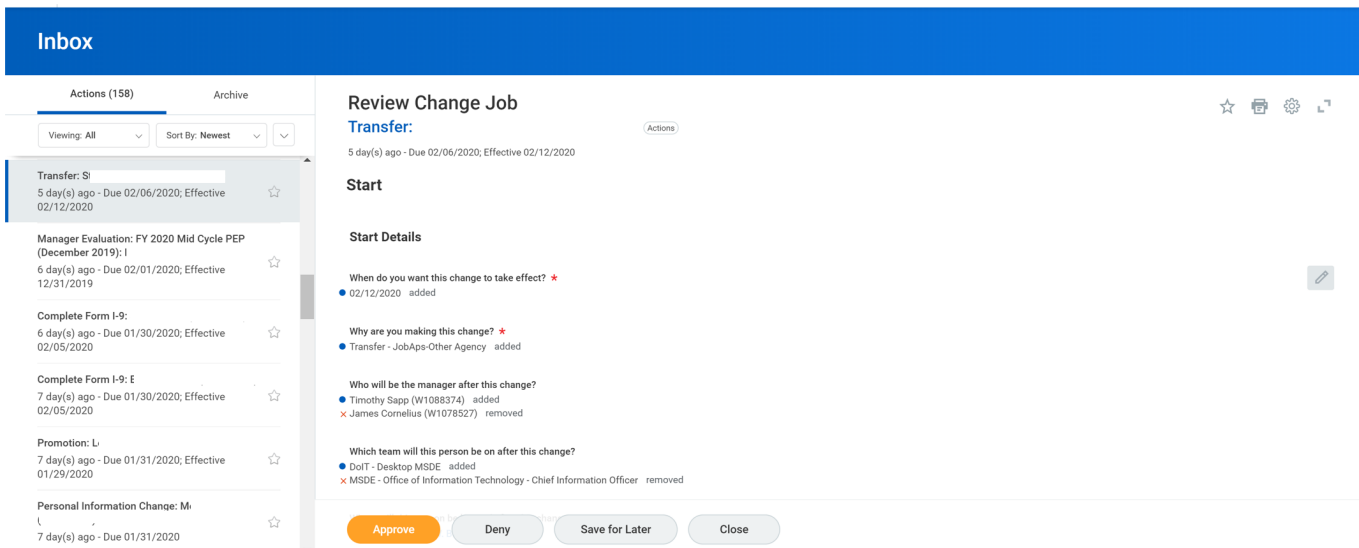
When a promotion, voluntary demotion, or transfer occurs as a result of recruitment in JobAps, you will receive a required action in your inbox. All job change data is entered automatically when the Change Job process is initiated by JobAps. The HR Coordinator needs to review this information and approve. After your approval and submission, all other steps in the Change Job business process will follow.

The procedure to review promotions, demotions, and transfer from JobAps follows. If you need to complete a promotion, demotion, or transfer that is not recruited in JobAps use the "Initiate Change Job in Workday" procedure.


Procedure:

1. Click the **Inbox**  icon.
2. Click the **Inbox** [Go to Inbox](#) hyperlink.

Inbox



The screenshot displays the JobAps Inbox interface. On the left, a sidebar shows a list of tasks under the 'Actions (158)' tab, including 'Transfer: SI', 'Manager Evaluation: FY 2020 Mid Cycle PEP', 'Complete Form I-9', 'Promotion: L', and 'Personal Information Change: M'. The main content area is titled 'Review Change Job Transfer' and shows details for a task initiated 5 days ago, due on 02/06/2020, and effective on 02/12/2020. The task details include a 'Start' section with 'Start Details' and a list of actions: 'When do you want this change to take effect?' (02/12/2020 added), 'Why are you making this change?' (Transfer - JobAps-Other Agency added), 'Who will be the manager after this change?' (Timothy Sapp added, James Cornelius removed), and 'Which team will this person be on after this change?' (DoIT - Desktop MSDE added, MSDE - Office of Information Technology - Chief Information Officer removed). At the bottom, there are buttons for 'Approve', 'Deny', 'Save for Later', and 'Close'.

3. Click the Change Job task in your inbox.
4. Click the arrows  to expand the window.



Inbox

← 16 of 158↑ ↓

Review Change Job

Transfer:

5 day(s) ago - Due 02/06/2020; Effective 02/12/2020

Actions

☆ 🖨 ⚙️ ↻

Start

Start Details

When do you want this change to take effect? ★
● 02/12/2020 added

Why are you making this change? ★
● Transfer - JobAps-Other Agency added

Who will be the manager after this change?
● Timothy Sapp \ \ \ \ \ added
✕ James Cornelius (V removed

Which team will this person be on after this change?
● DoIT - Desktop MSDE added
✕ MSDE - Office of Information Technology - Chief Information Officer removed

Where will this person be located after this change?
📍 Baltimore - 200 W. Baltimore St

Do you want to use the next pay period?
● Yes added

Approve

Deny

Save for Later

Close


5. Scroll to see full details.

6. Click the **Approve**  button.



Important Note:

If the HRC makes any changes to the details on the transfer event in the inbox, the PIN will be removed from the position field. *Check this field before selecting the submit options for this transaction.*

7. Click the Done  button. You will retrieve the next task from your inbox.



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

- 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.
- See the Check the Status of a Business Process section of this guide for details on how to view, access, or complete other tasks in the process.

8. The System Task is complete.



Initiate a Transfer in Workday

To start a transfer in Workday that was not initiated in JobAps, follow the procedure below.

NOTE: If the HR Coordinator in the “Current” Agency initiates the transfer, only the new manager, related sup org, and the reason can be entered. This action is considered a “Request for a Transfer” in Workday. The process will route to the next person as listed in the Business Process Overview section of this guide.

Procedure:

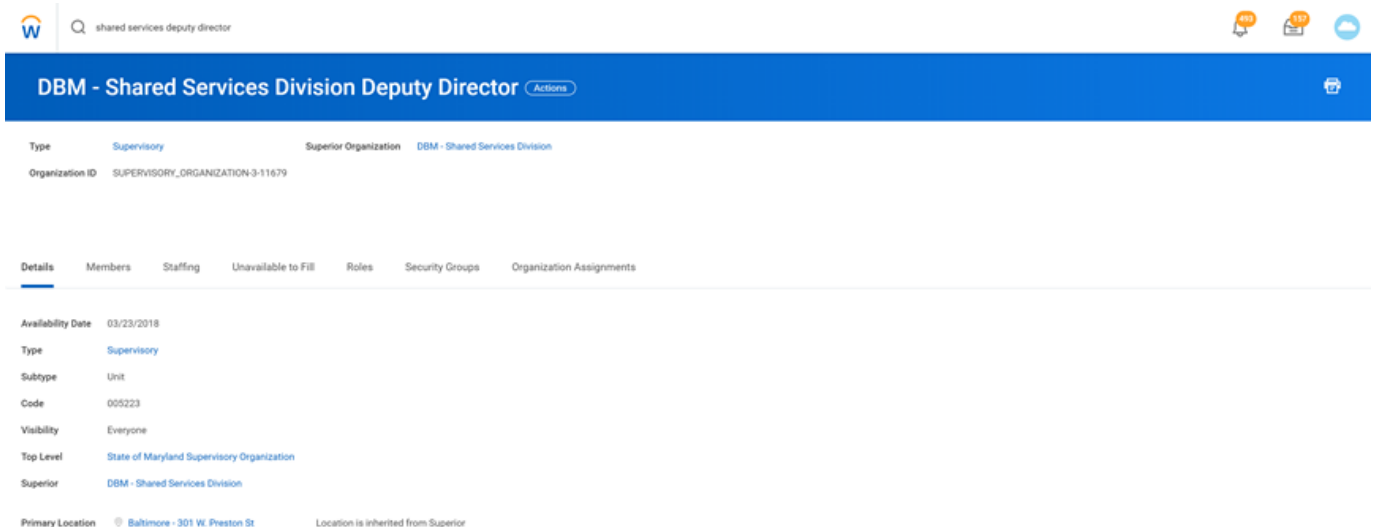
1. Type the Supervisory Organization name in the Search field.



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 a Supervisory Organization. At the top, there is a search bar with the text "shared services deputy director" and a search icon. Below the search bar, the title "DBM - Shared Services Division Deputy Director" is displayed with an "Actions" button. The main content area shows details for the organization, including Type (Supervisory), Superior Organization (DBM - Shared Services Division), and Organization ID (SUPERVISORY_ORGANIZATION-3-11679). A tabbed interface at the bottom shows "Details" as the active tab, with other tabs for Members, Staffing, Unavailable to Fill, Roles, Security Groups, and Organization Assignments. The Details tab displays various attributes: Availability Date (03/23/2018), Type (Supervisory), Subtype (Unit), Code (005223), Visibility (Everyone), Top Level (State of Maryland Supervisory Organization), Superior (DBM - Shared Services Division), and Primary Location (Baltimore - 301 W. Preston St).

4. Click the **Members**  tab.



Title: Change Job - Transfer
Functional Area: Staffing

Organization Members

DBM - Shared Services Division Deputy Director [Actions](#)

Type

Supervisory

Superior Organization

DBM - Shared Services Division

Organization ID SUPERVISORY_ORGANIZATION-3-11679

Details

Members

Staffing

Unavailable to Fill

Roles


Security Groups

Organization Assignments

Members

6 items

Worker	Position	Phone
Amy Angst (063203 HRIS Analyst III DBM	
ASHLEY LOVETT (075080 HRIS Analyst II DBM	+1 (410) 767-9810 (Primary) + 443847-0780 (Primary)
Heather Harrison (005145 HRIS Analyst III DBM	
KATRINA REID (073090 HRIS Analyst II DBM	
Lorin Barnes (061646 HRIS Analyst I DBM	
MARY TRAPANE (005300 HRIS Analyst II DBM	

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




Organization Members

Type [Supervisory](#) Superior Organization [DBM - Office](#)

Organization ID SUP_04939

Details **Members**

Members 45 items

1. 

2. **Job Change**

3. **Transfer, Promote or Change Job**

Worker **Angela**

Contact **Work Address** 301 W. Preston Street B

Services Division

Business Title Personnel Associate III

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

Change Job

Start

Start Details

When do you want this change to take effect? *

02 / 12 / 2020

Why are you making this change? *

Who will be the manager after this change?

× Leslie

Which team will this person be on after this change?

× DBM - Shared Services


Where will this person be located after this change? *

× Baltimore - 301 W. Preston St

Do you want to use the next pay period?

☒

Start **Cancel**

7. Click the Edit  icon to update the following fields on the Start page, if applicable.

- When do you want the change to take effect? (Enter the effective date.)
- Why are you making the change? (Enter one of the event reasons below.)
 - Transfer – Contractual Conversion (Converting contractual PIN to a merit PIN)
 - Transfer – (Non-Conversion) – triggers compensation
 - Transfer – End of Temporary Duty
 - Transfer – Indep Agency (to a CPBI agency)
 - Transfer – Intra Agency (to a sup org within the same agency)
 - Transfer – Other Agency (to another SPMS agency)
 - Transfer – Reassignment in Same Agency (reassignment to another position within the same agency)
 - Transfer – Temporary Duty
- Who will be the manager after the change, per the effective date? (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.

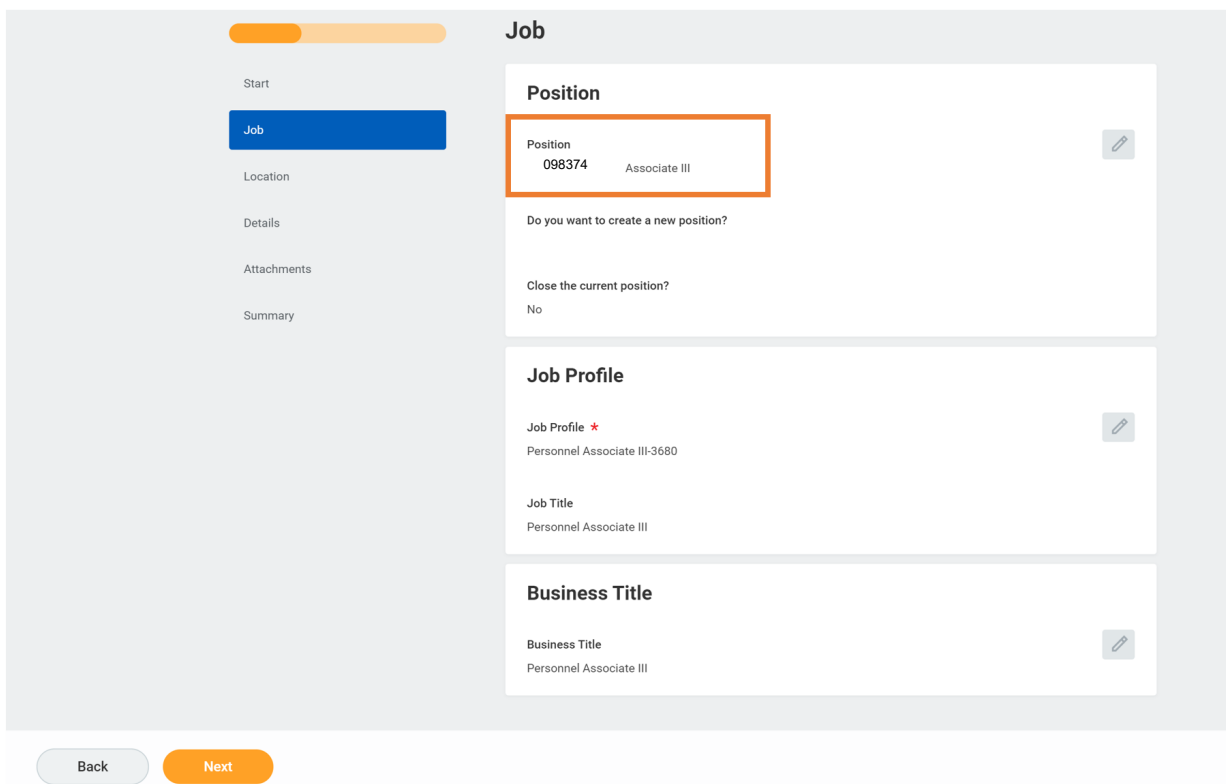
Click the Edit  icon to update the following field, if applicable:

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



Information: Leave “I plan to backfill this headcount” selected.

Change Job



Job

Start

Job

Location

Details

Attachments

Summary

Position

Position
098374 Associate III

Do you want to create a new position?

Close the current position?
No

Job Profile


Job Profile *
Personnel Associate III-3680

Job Title
Personnel Associate III

Business Title

Business Title
Personnel Associate III

Back Next

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

- Position (do not change for reclassification or if splitting a position)
- Job Profile (defaults from position)
- Business Title (Working Title; defaults from position)

11. Click the **Next**  button.



Change Job

IF YOU ARE CHANGING THE JOB PROFILE OF A POSITION, YOU MUST ALSO MAKE SURE THAT THE "PAY RATE TYPE" MATCHES THE POSITION TYPE:

CONTRACTUAL = HOURLY
STATE/REGULAR = SALARY

Location

Start

Job

Location

Details

Attachments

Summary


Location Details

Location *
Baltimore - 301 W. Preston St

Scheduled Weekly Hours
40

Back

Next

12. 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)

13. Click the **Next**  button.



Change Job

Start

Job

Location

Details

Attachments

Summary

Job Classifications

Additional Job Classifications

Administrative

Employee Type *

Contractual - Contract (Fixed Term)

Time Type *

Full time

Pay Rate Type

Salary

Location Weekly Hours

40

Default Weekly Hours

40

FTE

100%

Job Exempt


Yes

Job Category

Management Service

Back

Next

14. 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).



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

15. Click the **Next**  button.



Change Job

IF YOU ARE CHANGING THE JOB PROFILE OF A POSITION, YOU MUST ALSO MAKE SURE THAT THE "PAY RATE TYPE" MATCHES THE POSITION TYPE:

CONTRACTUAL = HOURLY
STATE/REGULAR = SALARY

Start

Job

Location

Details

Attachments

Summary

Attachments

Documents

Add

Back

Next

16. 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.

17. Click the **Next**  button.



Change Job

Start

Start Details

When do you want this change to take effect? *

02/05/2020

Why are you making this change? *

Transfer - Intra Agency

Who will be the manager after this change?

Leslie I

Which team will this person be on after this change?

DBM - Shared Services

Where will this person be located after this change?

Baltimore - 301 W. Preston St

Do you want to use the next pay period?

Job

Position

Position


108633 Admin Prog Mgr II

Submit

Save for Later

Cancel

Guide Me

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

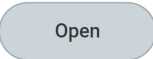


Tip: If you do not want to submit the request at this point, you can also click one of the following buttons:

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

19. Click the **Done**  button.

20. The System Task is complete.

NOTE: If your transaction includes a compensation change, this task will now be in your inbox, or select the open  button to continue.



To Do Inbox Items for Employee

(Completed by Current HR Coordinator)

When a worker leaves a job, there may be a need to assign that worker's roles to another worker or change the employee's current security assignments. For example, the worker leaving the position may have been acting as a HR Coordinator, HR Partner, or other HR role. If there is no one else with the same role that could perform the function(s), the role should be reassigned to another worker.

In this scenario, the HR Coordinator in the Agency that the employee is leaving receives a "To Do" to assign roles to another worker.

Do one of the following...

- If it is determined that there is a need to assign a role(s) to another worker,
 - a. Complete the **Application and Authorization for OBSP System Access SPS** security form for the worker and send it to DBM Shared Services at shared.services@maryland.gov.
 - b. "Mark" the task as completed in your inbox by clicking Submit.
- If it is determined that it is not necessary to assign a role(s) to another worker.
 - a. "Mark" the task as completed in your inbox by clicking Submit.

NOTE: If the worker's role is assigned to more than one person, it may not be necessary to assign roles to another worker.

The procedure to assign roles to another worker follows.

Procedure:

1. Click the **Inbox**  icon.
2. Click the **Inbox** [Go to Inbox](#) hyperlink.

Actions (161)

Archive

Sort By: Newest

From Last 30 Days

Transfer: Angela

1 minute(s) ago - Successfully Completed: Multiple Parties

Contract: Angela

1 minute(s) ago - Successfully Completed: Cheryl Murphy (W1062466)

Compensation Change: Angela Hill (W1049313) - 108633 Admin Prog Mgr II

3 minute(s) ago - Successfully Completed

Transfer: Stephanie I

20 hour(s) ago - In Progress: Multiple Parties

Promotion: KainosSmart StateRegularFT2 (nded)

1 day(s) ago - Rescinded

Compensation Change: KainosSmart StateRegularFT2prom

1 day(s) ago - Rescinded

Leave Request: KainosSmart StateRegularFT9

2 day(s) ago - Successfully Completed

View Event

Transfer: Angela

Actions

1 minute(s) ago - Successfully Completed: Multiple Parties

For

DBM - Shared Services C

Overall Process

Transfer: Angela

Overall Status

Successfully Completed

Due Date

02/13/2020

Calendars In Use

Consecutive Days (No Calendars Selected)

My Actions

Details

Process

My Actions

4 Items

Awaiting Me	Due Date	Business Process	Subject
To Do		Request Compensation Change: Contract: Angela I	Request Compensation Change
To Do	02/05/2020	Review User-Based Security Group Assignments: Transfer: Angela I	Review User-Based Security Group Assignments
To Do	02/05/2020	Assign Roles to Another Worker: Transfer: Angela	Assign Roles to Another Worker
Open	02/08/2020	Transfer: Angela I	DBM - Shared Services Division



Inbox

3. Go into each ToDo item and complete the task advised if necessary.

Complete To Do

Review User-Based Security Group Assignments (Actions)

9 minute(s) ago - Due 02/05/2020; Effective 02/05/2020


For [DBM - Shared Services I](#)

Overall Process [Transfer: Angela I](#)

Overall Status Successfully Completed

Due Date 02/13/2020

Instructions Review worker's assigned user-based security groups and reassign as necessary.



SubmitSave for LaterClose

4. Click the **Submit**  button.



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.
- See the Check the Status of Business Process section of this guide for details on how to view, access, or complete other tasks in the process.

5. The System Task is complete.



Important Note: If the employee is transferring from a contractual position to a merit position, you will need to complete the Edit Service Dates business process and enter a **"Time Off Service Date"** for the employee to start to accrue leave. The system will not prompt this step.