



STATEWIDE PERSONNEL  
— S Y S T E M —

**Edit Position Restrictions**

October 2015



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## Edit Position Restrictions Business Process

### **Business Process Overview**

The Edit Position Restrictions business process allows you to edit position(s). This business process gives you the ability to reclassify or change the positions using various reasons. See the Events and Reasons section below for details

If you make a change to a position that is filled, you must also update the associated worker's job information using Change Job business process (discussed in the previous lesson). The steps in the Edit Position Restrictions business process are listed in the table below.

Process Steps	Role	Description
<b>Initiate the process</b>	HR Coordinator	Enter the request and submit via Workday.
<b>Change Organization Assignments (if applicable)</b>	HR Coordinator	Update the Authorized % when splitting or consolidating a position
<b>Attach Supporting Document (if applicable)</b>	HR Coordinator	Complete and attach reclassification study supporting documents (MS-52 Form, MS-44/2024 Form).
<b>Agency Approvals</b>	HR Partner	Review and approve or deny transaction. Review attachments using the Edit Position Restriction Attachment report.
	Appointing Authority Partner	Review and approve or deny transaction. Review attachments using the Edit Position Restriction Attachment report.
<b>Budget Approvals (if applicable)</b>	Budget Finance Partner Budget Administrator	Review and approve or deny 'Split a Position' and "Reconsolidate a Position" transactions.
<b>Reclassification Study Review (if applicable)</b>	Central Class Support Staff	Review the transaction and attachment (using the Edit Position Restrictions Attachments report) for completeness.
	Central Class Partner	Review study request; assign an analyst and a due date.
	Central Class Analyst	Perform study; create and attach Study Memorandum.
	Central Class Partner	Review study results; approve or deny study request.
<b>Job Change for Worker (if position is filled)</b>	HR Coordinator	If the position is filled, the HR Coordinator will process a Job Change to update the Worker profile.
		Initiate Job Change
		Propose Compensation
		Role Assignment To Do; Reassign Roles to another Worker (based on user based and rules security)
		Review Pay Group
		Manage Business Process Worker

**NOTE:** Your request is routed based on the type of transaction submitted as noted above, whether the position is filled or unfilled, and other conditions as noted above.



**Events and Reasons**

You must select one of the following reasons listed in the table below when initiating and Edit Position Restrictions request. Your request is routed for approval based on the reason selected.

<b>Event</b>	<b>Reason</b>
<b>Change in Positions</b>	Change in Position>Change Location
	Change in Position>Reconsolidate a Split Position
	Change in Position>Split a Position
	Change in Position>Update a MS-22
<b>Reclassification</b>	Reclassification>Benchmark
	Reclassification>Benchmark Study
	Reclassification>Non-Competitive Promotion
	Reclassification>Reclassification Study
	Reclassification>Special Condition
	Reclassification>Vacancy Downgrade

**Before you begin...**

You will need the following information to complete the process:

- Position Change Reason
- Job Posting Title
- Availability Date
- Earliest Hire Date
- Job Profile (if applicable)
- Location
- Time Type
- Responsibilities (if applicable)

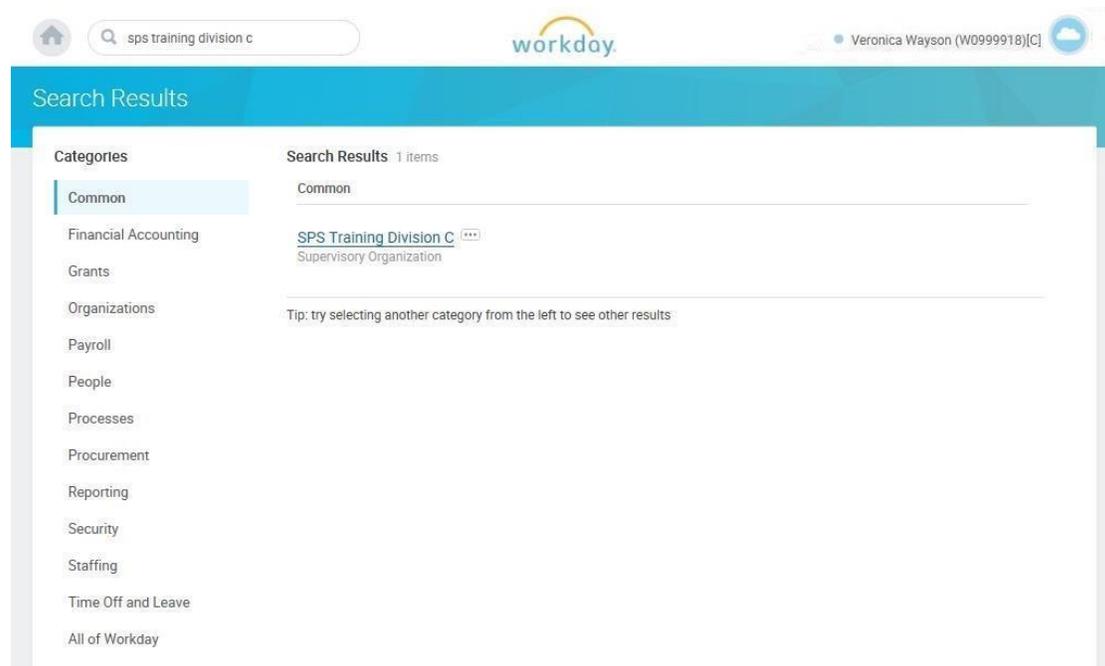
## Edit Position Restrictions

The procedure to initiate the Edit Position Restrictions process follows.

### Procedure:

1. Type the Supervisory Organization in the Search field.
2. Click the **search**  icon.

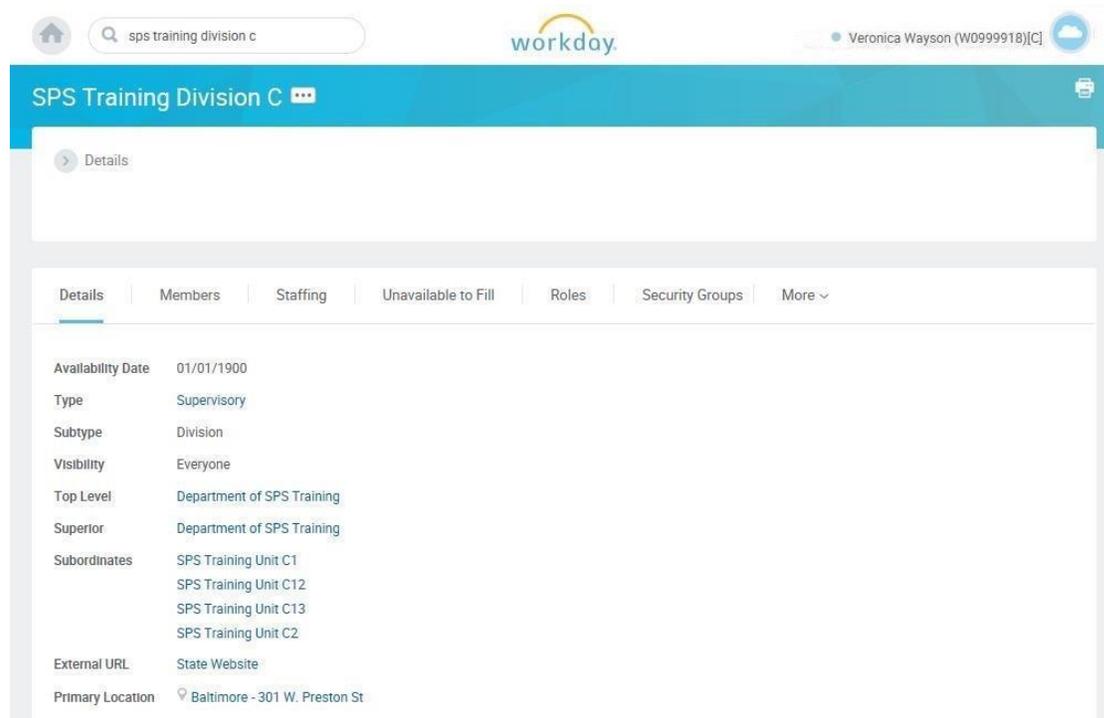
### Search Results



The screenshot shows the Workday interface. At the top, there is a search bar containing the text "sps training division c". To the right of the search bar is the Workday logo and a user profile for "Veronica Wayson (W0999918)[C]". Below the search bar, the "Search Results" section is displayed. On the left, there is a "Categories" sidebar with a list of categories: Common, Financial Accounting, Grants, Organizations, Payroll, People, Processes, Procurement, Reporting, Security, Staffing, Time Off and Leave, and All of Workday. The "Common" category is selected. The main content area shows "Search Results: 1 items". Under the "Common" category, there is a single result: "SPS Training Division C" with a three-dot menu icon, and below it, "Supervisory Organization". A tip at the bottom of the results area reads: "Tip: try selecting another category from the left to see other results".

3. Click the Supervisory Organization hyperlink.

## View Supervisory Organization

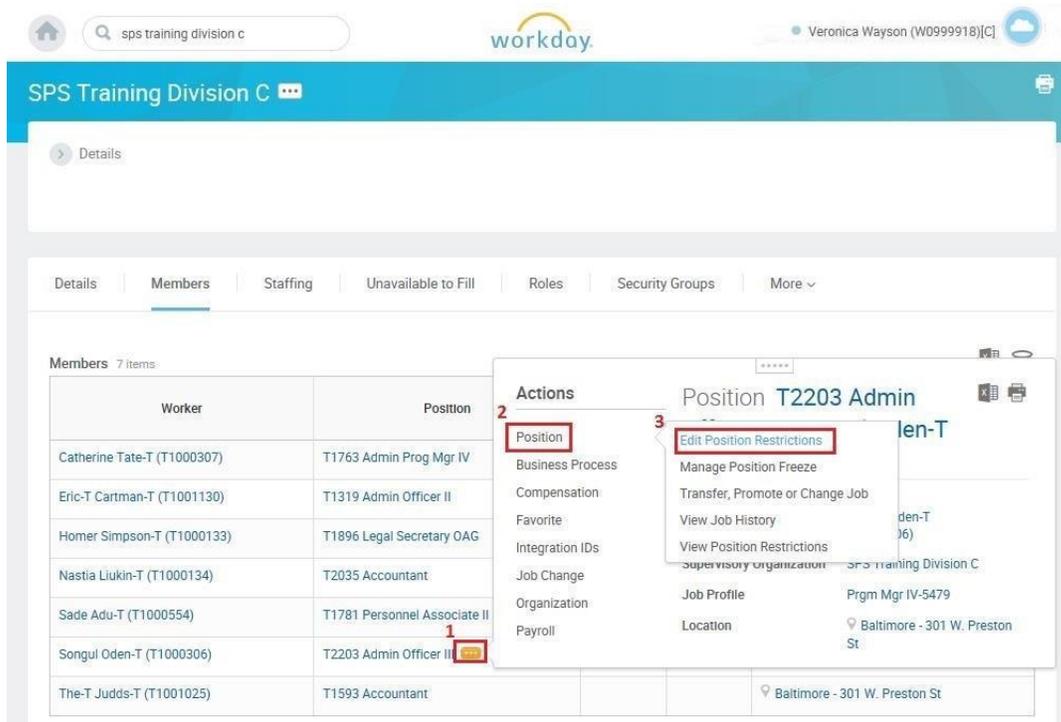


The screenshot shows the Workday interface for viewing a supervisory organization. The search bar contains 'sps training division c'. The user is Veronica Wayson (W0999918)[C]. The page title is 'SPS Training Division C'. The 'Details' tab is selected, showing the following information:

Field	Value
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 SPS Training Unit C12 SPS Training Unit C13 SPS Training Unit C2
External URL	State Website
Primary Location	Baltimore - 301 W. Preston St

4. Identify the position you want to update. Click the Members tab to update a filled position or Staffing tab to update an unfilled position.
5. Click on the Related Actions and Preview  button next to the position.

### View Supervisory Organization



6. In the menu, hover over Position and then click Edit Position Restrictions.
7. Type or use the prompt  icon to select the Position Change Reason.
8. Select one of the following options:

If	Then
The reason selected is in the Change in Position category....	Update one or more of the following fields, as applicable: <ul style="list-style-type: none"> <li>• Job Posting Title:</li> </ul> On the <b>Hiring Restrictions</b> tab: <ul style="list-style-type: none"> <li>• Earliest Hire Date (if applicable)</li> <li>• Job Profile</li> <li>• Location (if the primary location for the position is changing)</li> <li>• Time Type (if the position scheduled hours is changing)</li> </ul> On the <b>Qualifications</b> tab (MS-22 updates): <ul style="list-style-type: none"> <li>• Responsibilities</li> <li>• Work Experience</li> </ul>
The reason selected is in the Reclassification category....	Update following fields: <ul style="list-style-type: none"> <li>• Job Posting Title</li> </ul> On the <b>Hiring Restrictions</b> tab: <ul style="list-style-type: none"> <li>• Job Profile (if job class is changing)</li> </ul>

9. Click the Submit  button. This will submit the position request and route to the next step in workflow.



**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.



**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.

10. The next step is dependent on the reason for the request. Click Done  button.

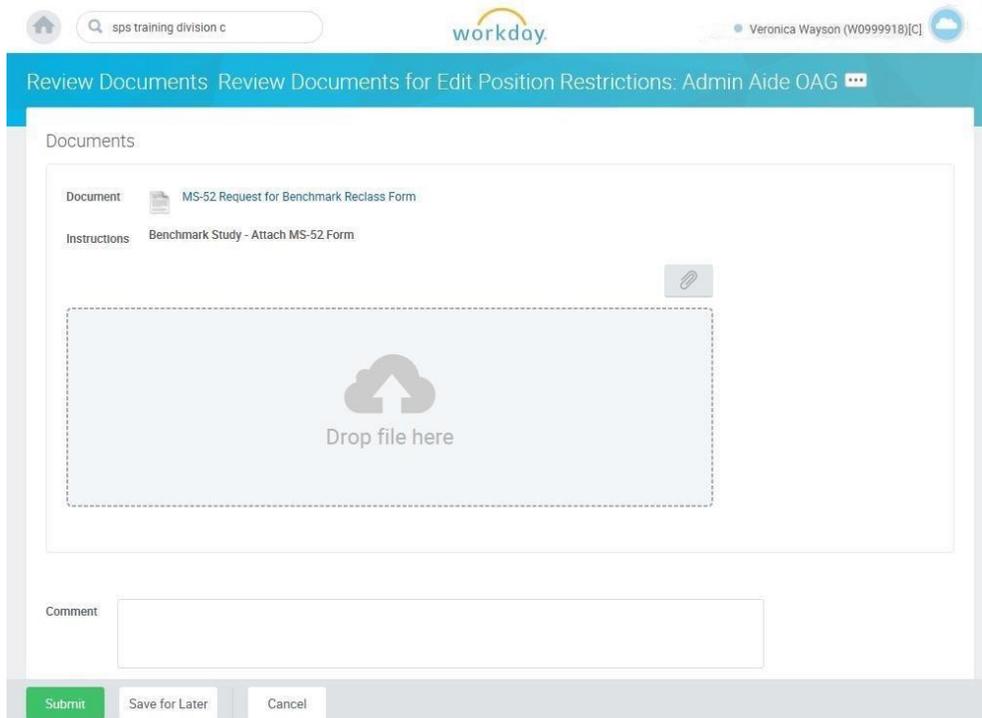
11. The System Task is complete.

## Attach Documentation (for Reclassification or Benchmark Study)

If you are submitting a Reclassification Study or Benchmark study request, then you need to attach the appropriate form to complete your Edit Position Restrictions request. You may access this task directly after submitting the initial request by clicking on View Documents or from your inbox.

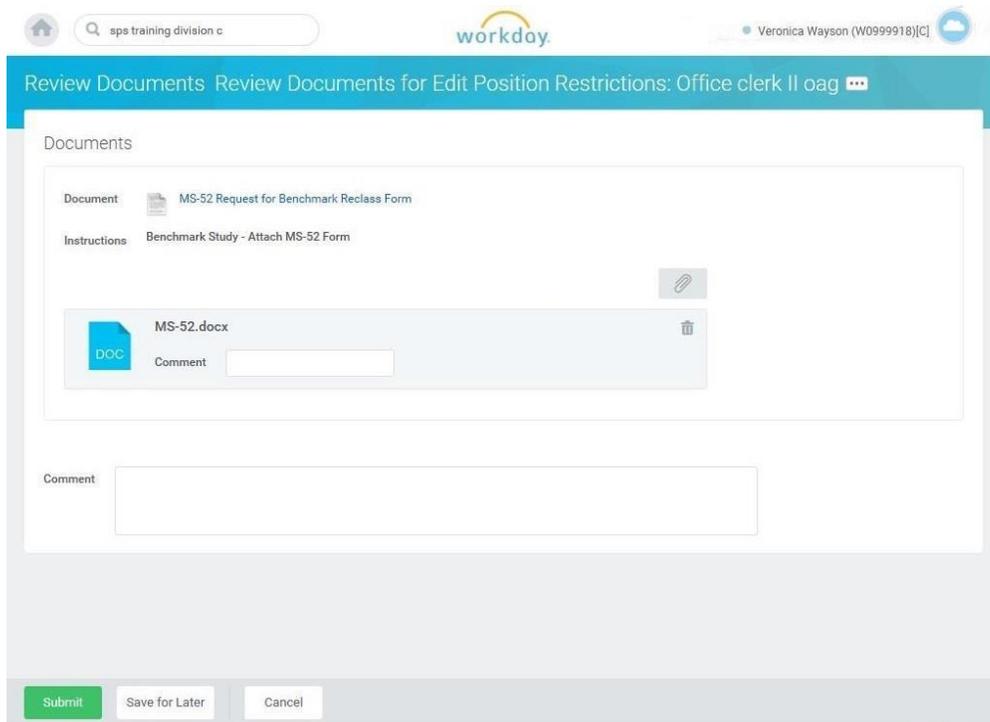
### Procedure:

#### Attach MS-52 or MS-44/2024 Form



1. Click the Paper Clip icon.
2. Browse for the document and attach the document.

**Attach MS-52 or MS-44/2024 Form**



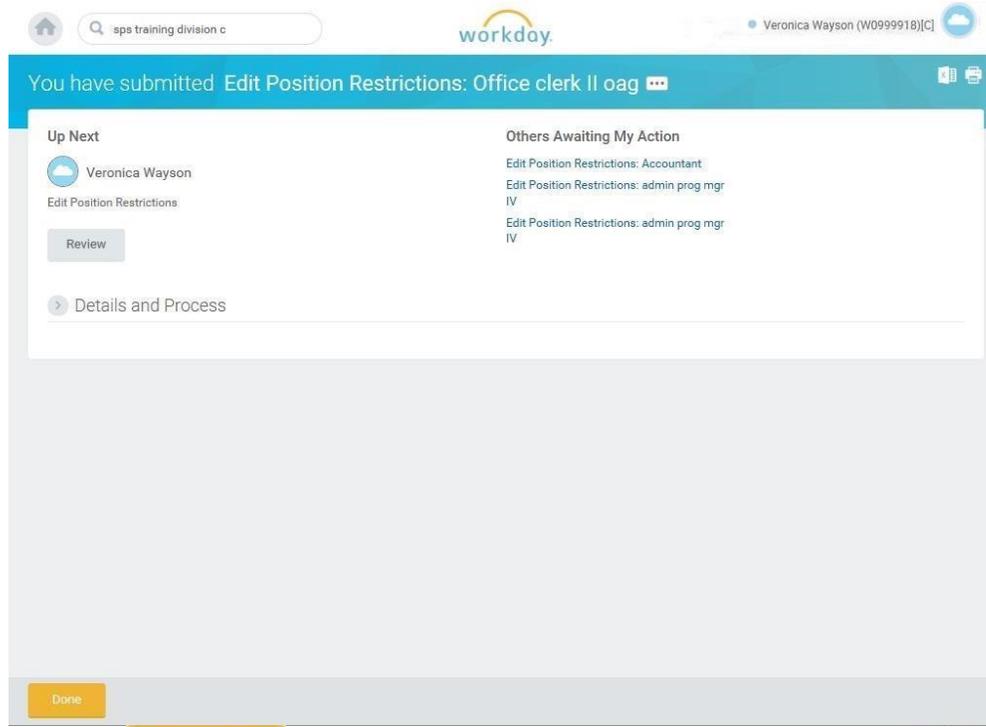
3. If applicable, enter an attachment comment in the Comment field next to the attached form.
4. Click the **Submit**  button.



**Tip:** If you do not want to submit a task at this point, then 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.

## View Event



5. Click the **Done**  button.



**Information:** Your request has been routed for review and approval.

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

6. The System Task is complete.

## Change Organization Assignments (for Split / Reconsolidated Positions)

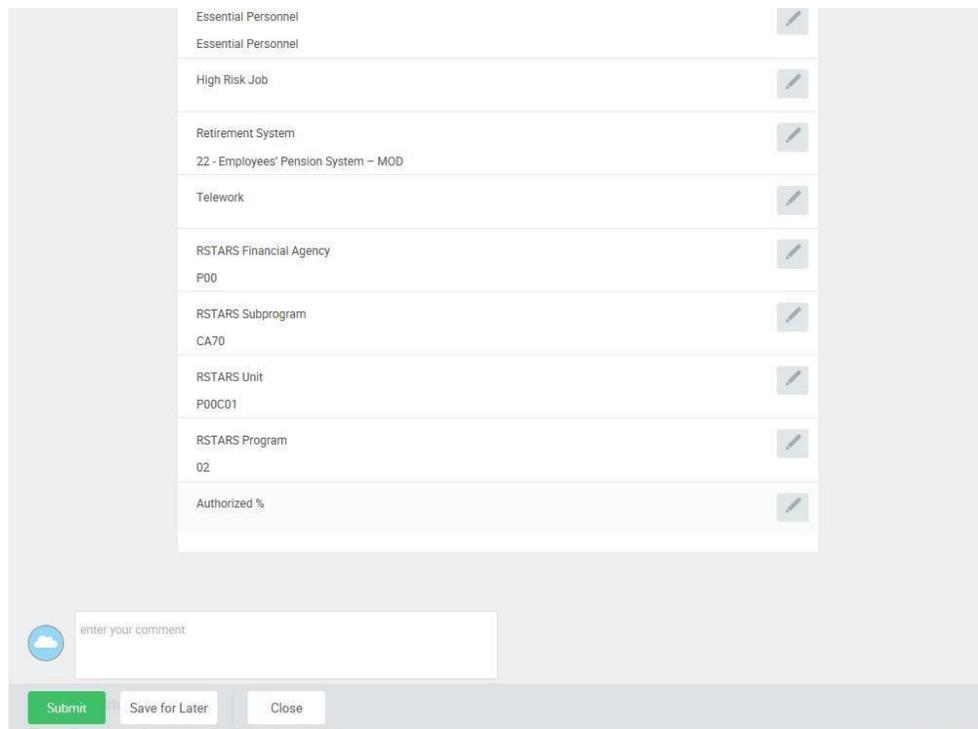
When a new position has been created or if a position is split or reconsolidated, you must assign organizations to the position. For positions that have been split or reconsolidated, you need to update the Authorized Percent for the position.

**Procedure:**



**Information:** If you did not assign organizations directly after submitting the edit position restriction request, then you can access this task from your inbox. Look for a task that begins with "Assign Organizations". The position name will be in the task description.

### Edit Position Restrictions



Essential Personnel	
Essential Personnel	
High Risk Job	
Retirement System	
22 - Employees' Pension System - MOD	
Telework	
RSTARS Financial Agency	
P00	
RSTARS Subprogram	
CA70	
RSTARS Unit	
P00C01	
RSTARS Program	
02	
Authorized %	

enter your comment

Submit Save for Later Close

1. Locate Authorized % in the Other section and click on the Edit  icon.
2. Type or use the Prompt  icon to select the Authorized %. For example, enter or select a percentage to designate the FTE % for the position such as "100" or "050".
3. Click the **Save**  button.



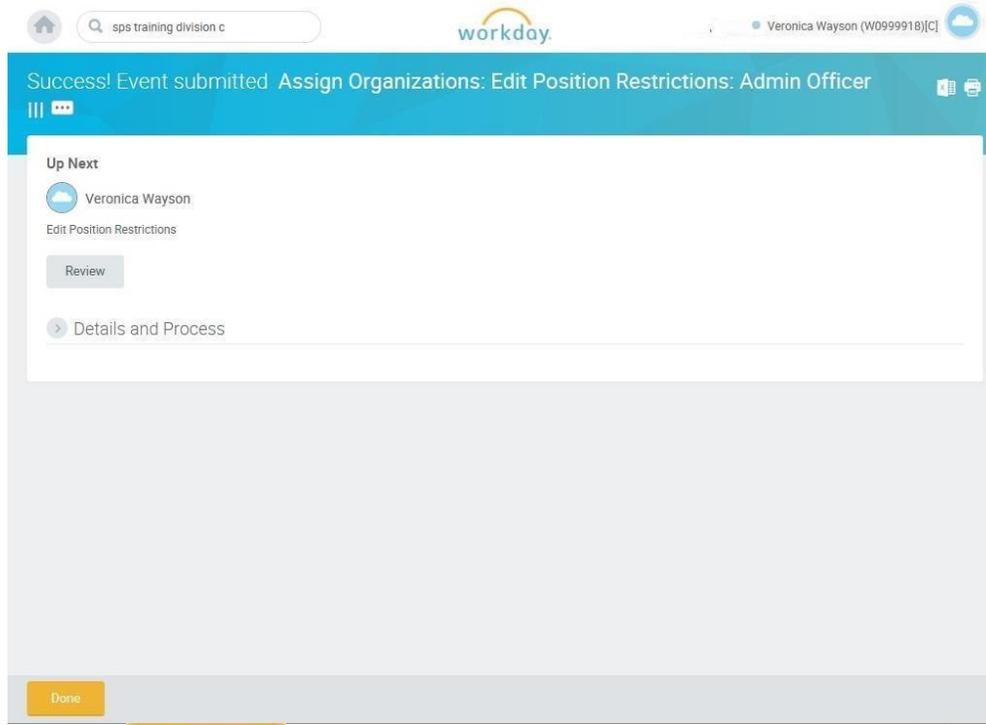
4. Click the **Submit**  button.

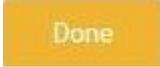


**Tip:** If you do not want to submit a task at this point, then you can also click one of the following buttons:

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

### Next Step: HR Partner Approval



5. Click the **Done**  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 a Business Process* section of this guide for details on how to view, access, or complete other tasks in the process.

6. The System Task is complete.

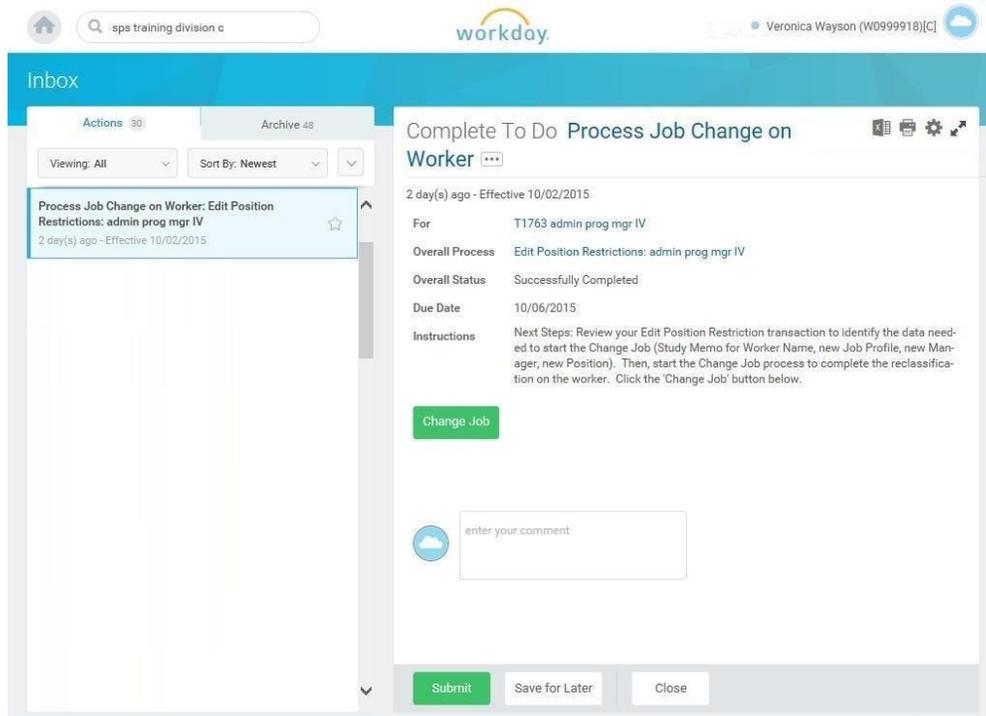
## Change Job for Edit Position Restrictions

When the position change was performed on a filled position, you will need to update the associated worker's job information.

### Procedure:

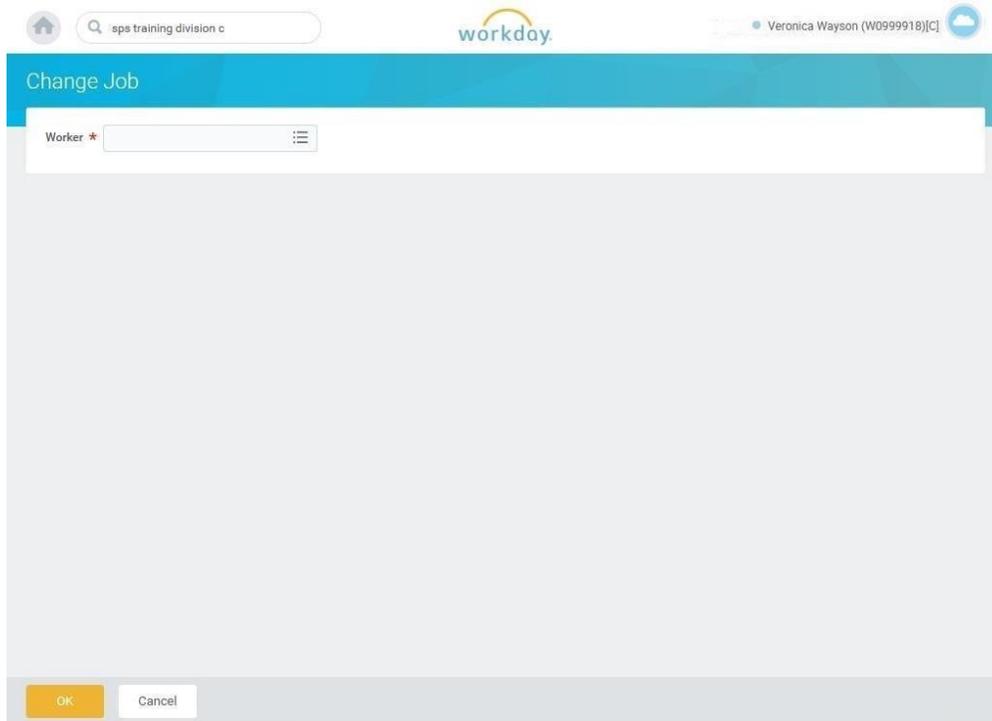
1. Click the **Inbox**  icon.
2. Click the Inbox  hyperlink.

### Inbox



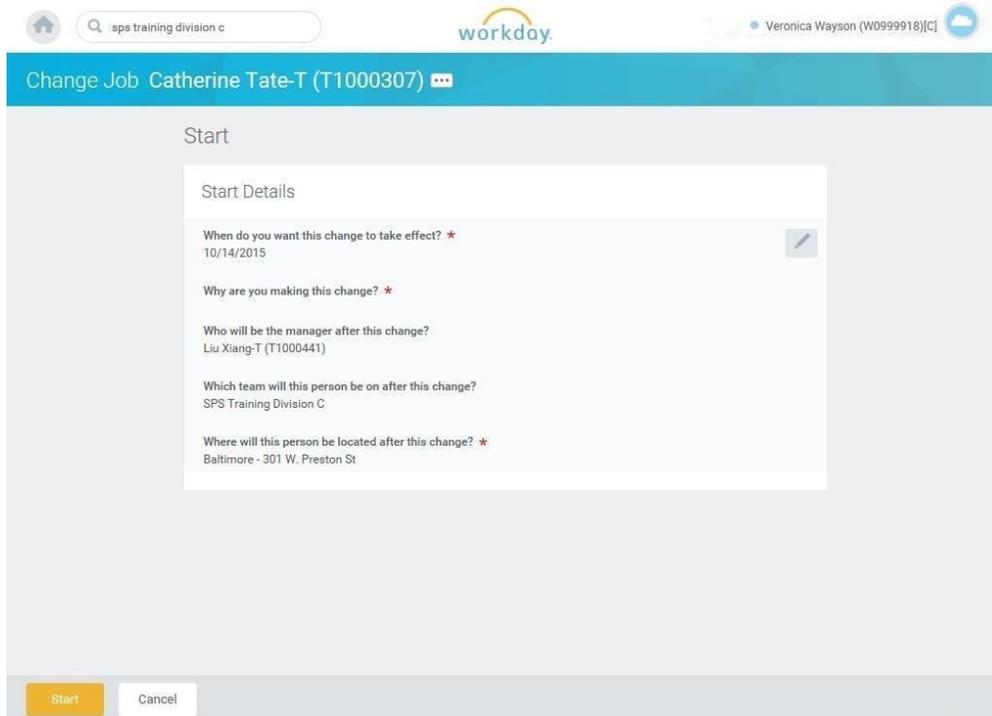
3. Click on the "Process Job Change on Worker: Edit Position Restrictions" task in your Actions list. The name of the position updated in the Edit Position Restrictions process displays in the task name.
4. Click on the arrows  to expand the view.
5. Click on Change Job  button to launch this process.

## Change Job



6. Type or use the Prompt  to enter the employee's name in the Worker's field.
7. Click the **OK**  button.

## Change Job



8. 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 event reason)
- 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.

9. Click the **Start**  button.

10. If an employee will have a new manager as a result of the job change, the Move Page displays.

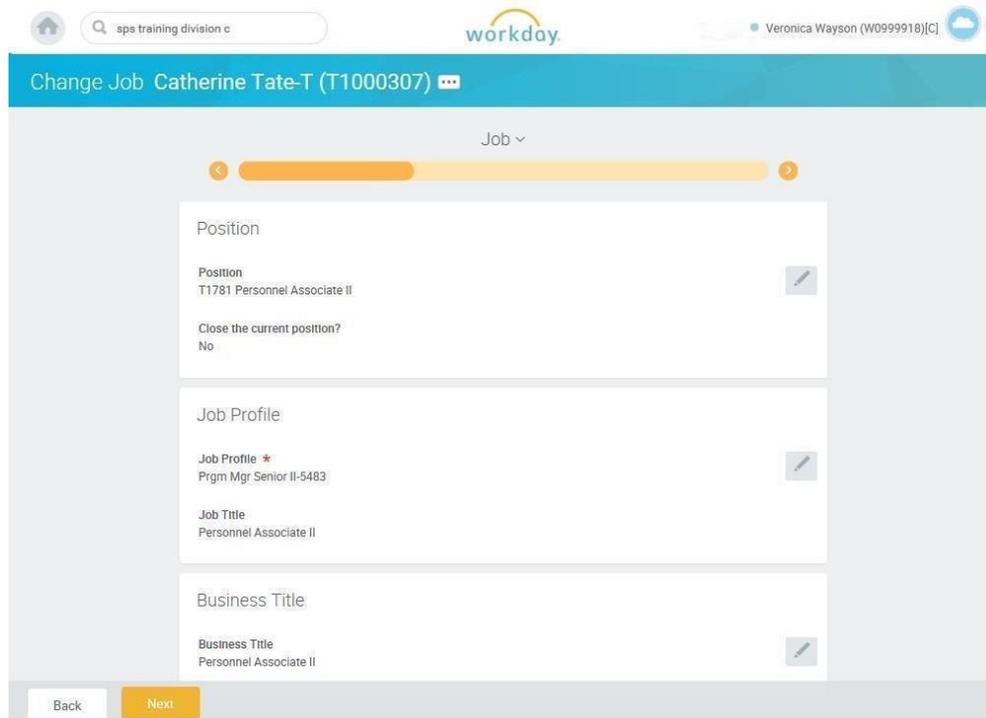
Click the Edit  icon to update the following field, if applicable:

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



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

## Change Job

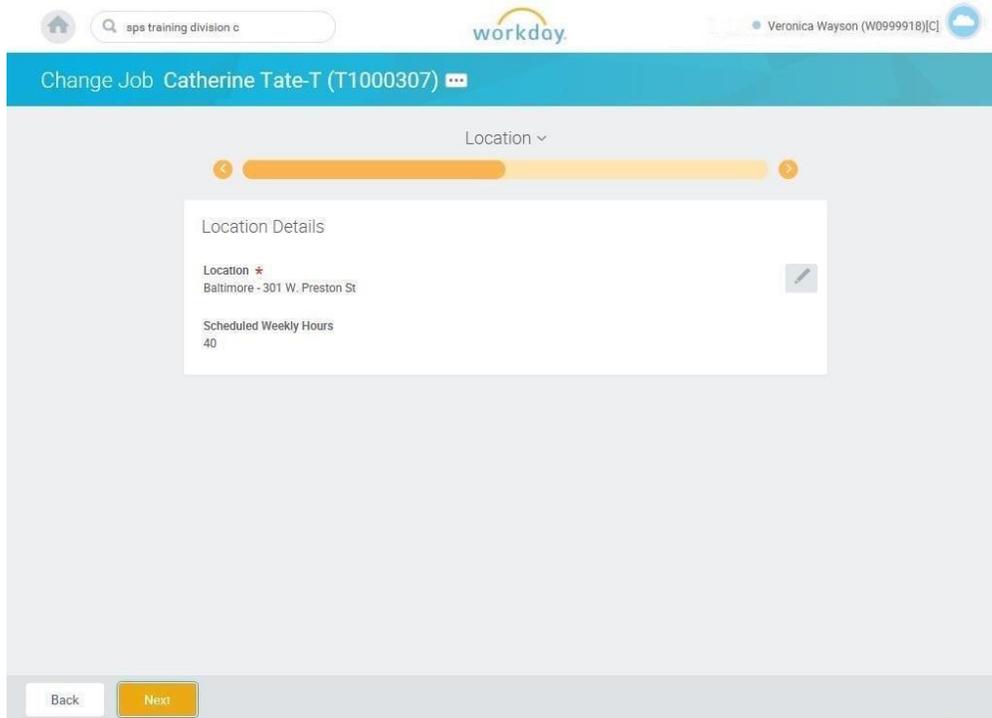


11. Click the Edit  icon to update the following fields on Job page, if applicable:

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

12. Click the **Next**  button.

## Change Job

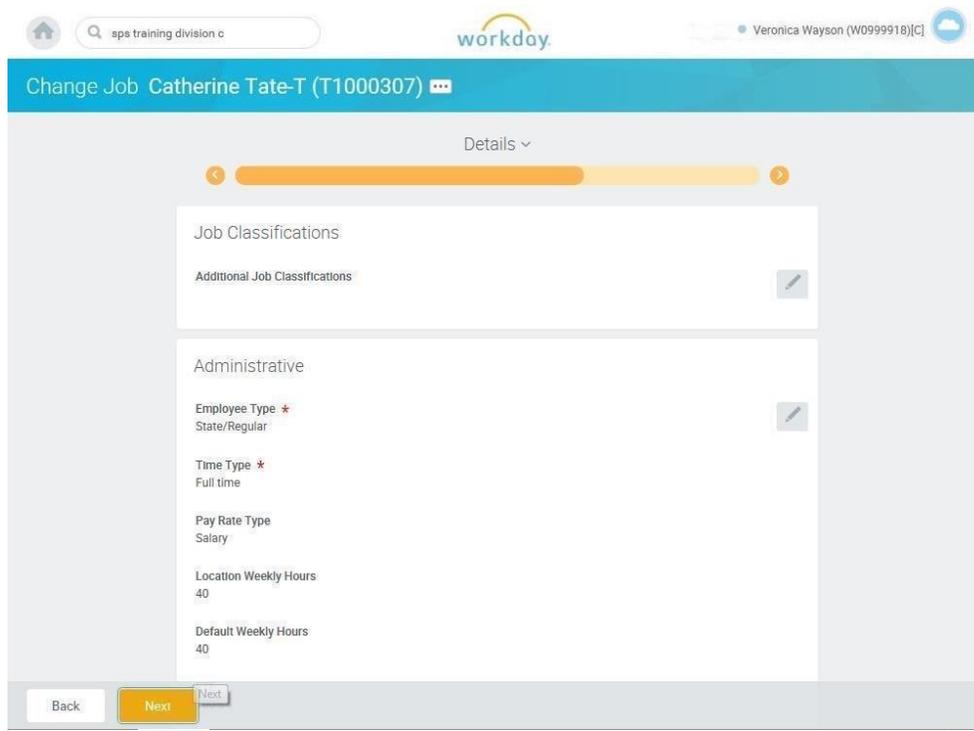


13. Click on the Edit  icon to update the following fields on Location page, if applicable:

- 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:

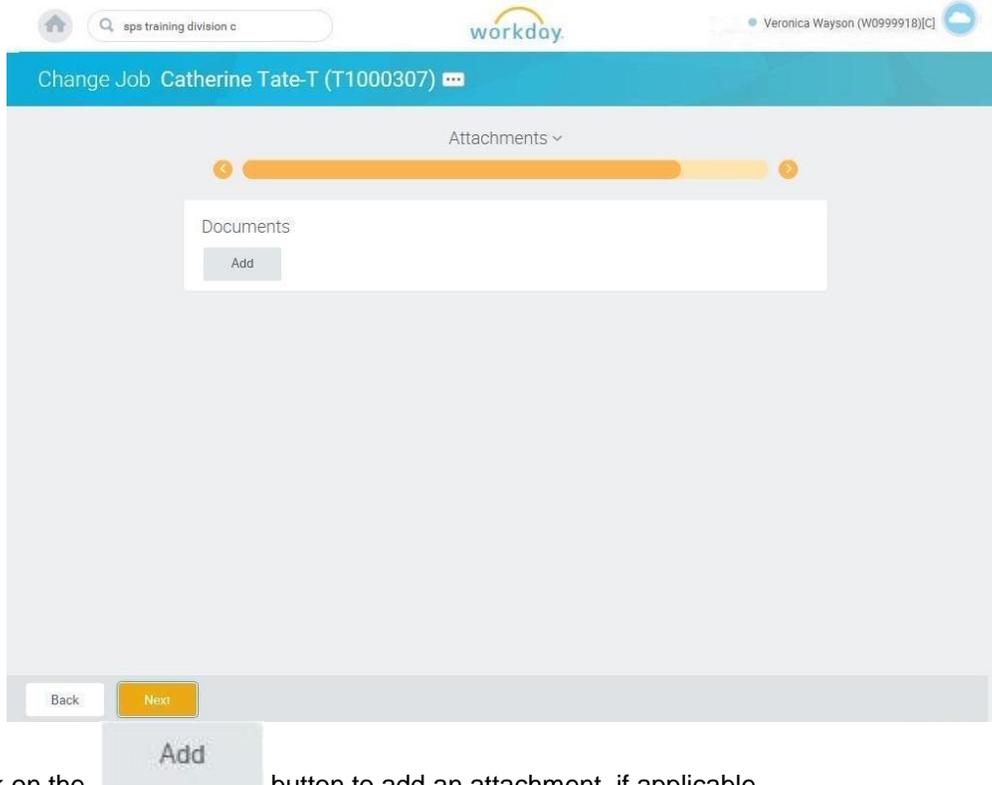
- Time Type (example: part-time/full-time, for FTE changes; this may also default from the position selected)



**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 **Add** button to add an attachment, if applicable.

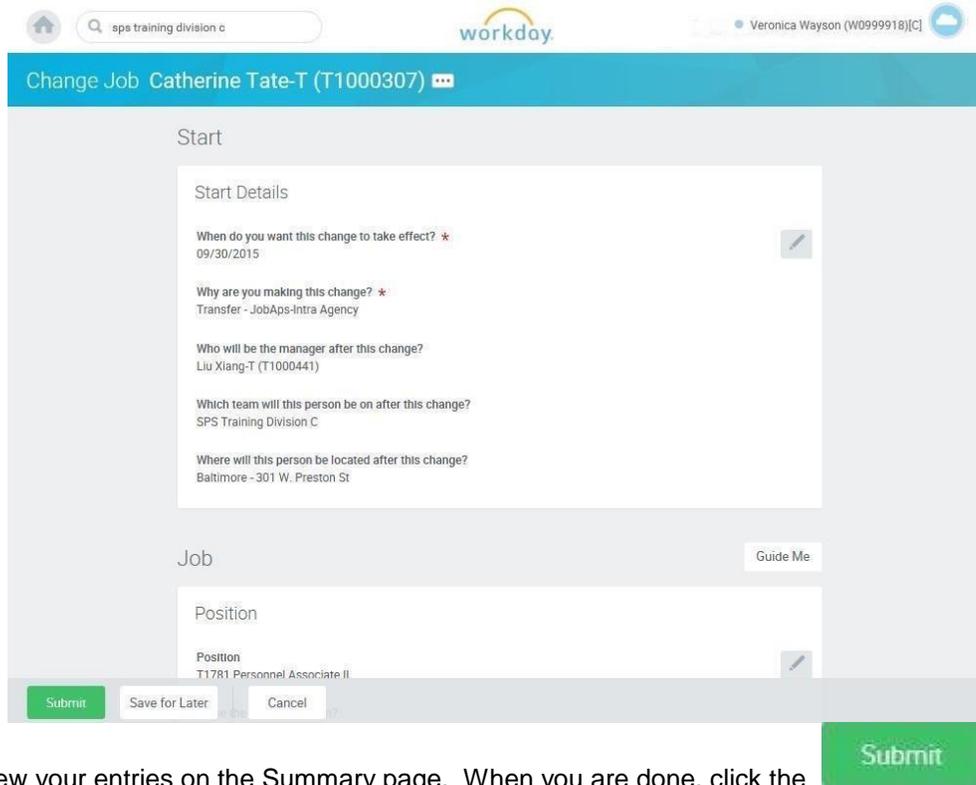
- Select the appropriate **Document Category**.
- Click the **Attach** button, browse and select a document to attach.



**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** button.

## Change Job



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

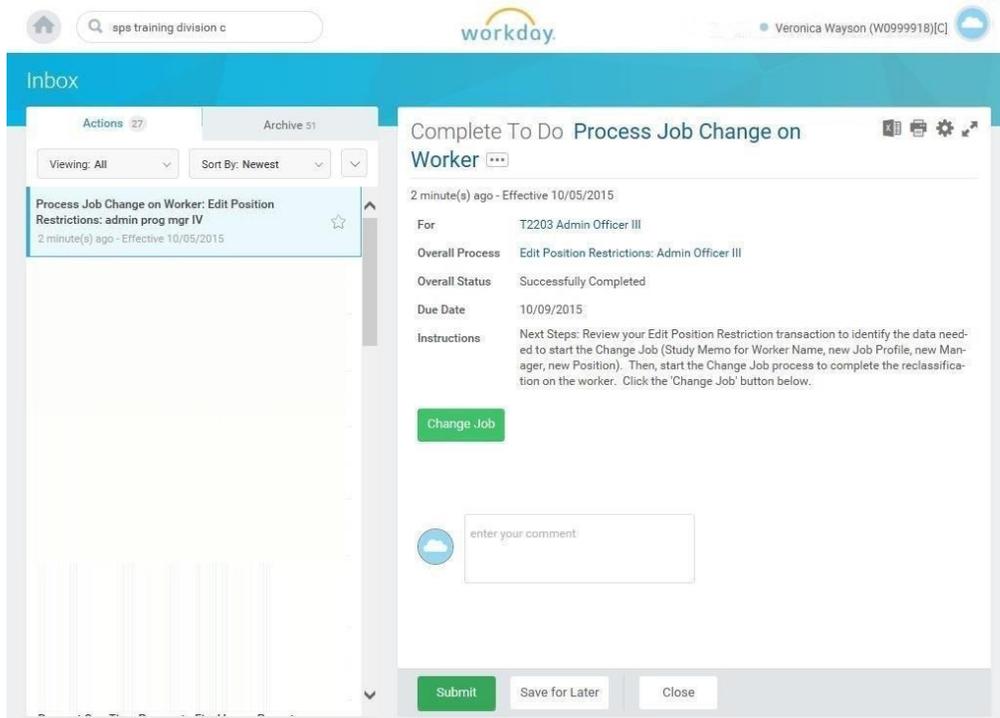


**Tip:** If you do not want to submit the request at this point, you can also click one of the following buttons:

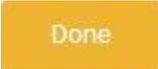
- Click **Save for Later** to save your changes but not submit.
- Click **Cancel** to cancel the process and start at another time.

20. Click the **Done**  button.

## Inbox



21. You must submit the Change Job task in your inbox. Click the Submit  button.

22. Click the **Done**  button.

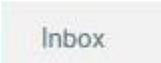
23. The System Task is complete.

## Propose Compensation

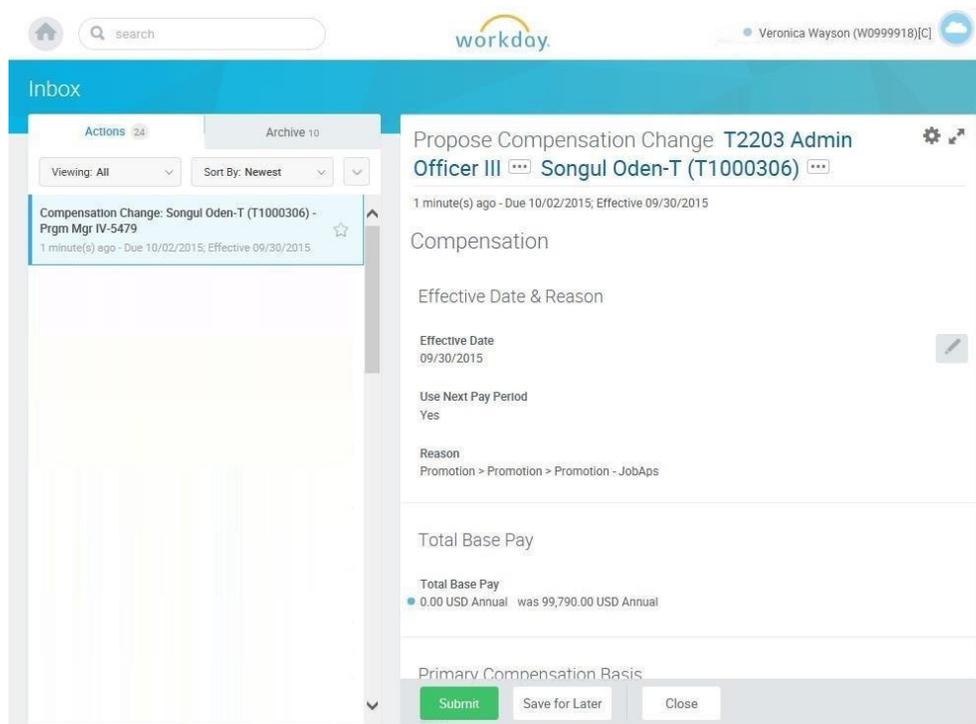
After submitting the job changes for an employee, you will update the employee's compensation. The procedure for this task follows.

**NOTE:** You will not perform this task for transfers.

### Procedure:

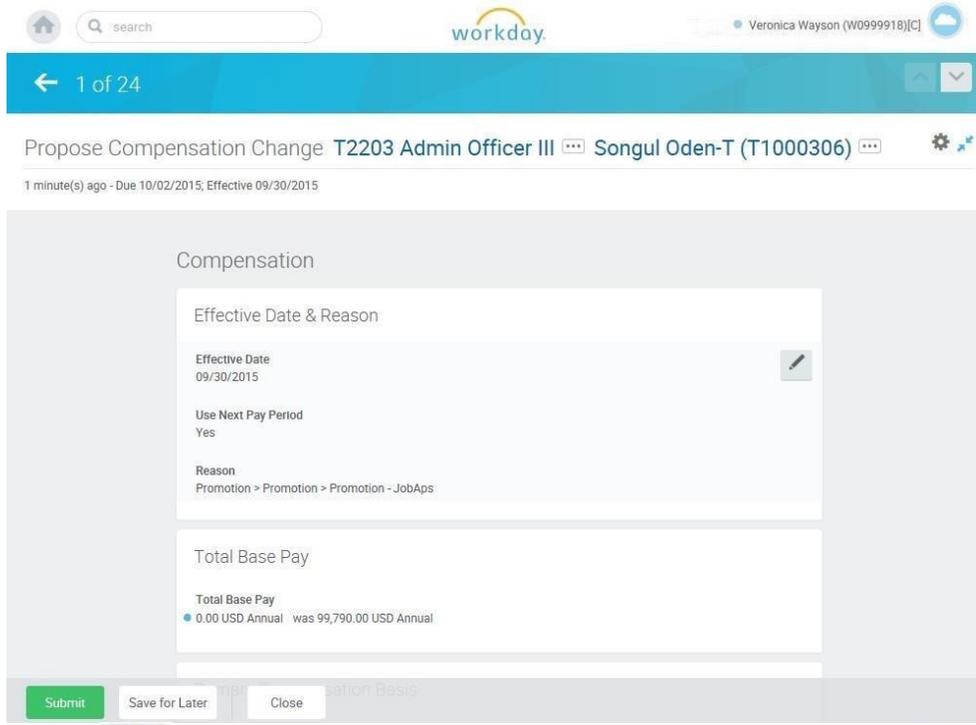
1. Click the **Inbox**  icon.
2. Click the **Inbox**  hyperlink.

### 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



workday

Veronica Wayson (W0999918)[C]

← 1 of 24

Propose Compensation Change T2203 Admin Officer III Songul Oden-T (T1000306)

1 minute(s) ago - Due 10/02/2015, Effective 09/30/2015

### Compensation

Effective Date & Reason

Effective Date  
09/30/2015

Use Next Pay Period  
Yes

Reason  
Promotion > Promotion > Promotion - JobAps

Total Base Pay

Total Base Pay  
0.00 USD Annual was 99,790.00 USD Annual

Submit Save for Later Close

5. Click the Edit  icon at the right of the row to be edited.

6. Select one of the following options:

If	Then
Employee is paid on the Standard Salary Schedule or any schedule that has a Grade Profile and Step.	 <ul style="list-style-type: none"> <li>- Click the <b>Edit</b> button in the <b>Guidelines</b> row.</li> <li>- Type or use the prompt to enter the <b>Step</b>.</li> <li>- Click <b>Save</b>.</li> </ul> <p><b>NOTE:</b> Compensation defaults based on the job profile. Choosing Step 10 or above requires additional approvals. Refer to Standard Pay Guidelines and Executive Pay Guidelines for more information.</p>
Employee is paid on the Executive Schedule.	 <ul style="list-style-type: none"> <li>- Click the <b>Edit</b> button in the <b>Salary</b> row.</li> <li>- Enter the salary in the <b>Amount</b> field.</li> <li>- Click <b>Save</b>.</li> </ul>
Employee Type is Contractual – Hourly.	 <ul style="list-style-type: none"> <li>- Click the <b>Add</b> button in the <b>Hourly</b> row.</li> <li>- Enter pay rate in the <b>Amount</b> field.</li> <li>- Click <b>Save</b>.</li> </ul>
Employee Type is Contractual – Contract (i.e., fixed term contractual).	 <ul style="list-style-type: none"> <li>- Click <b>Add</b> button in the <b>Allowance</b> row.</li> <li>- In the <b>Compensation Plan</b> field, type or use prompt to select <b>Contract NTE\$</b> from the list, if not already selected.</li> <li>- Enter the contract not to exceed amount (Contract NTE\$) in the <b>Amount</b> field.</li> <li>- Click <b>Save</b>.</li> </ul>

7. 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 **Close** to close the task and resume at a later time

## Inbox



Success! Event submitted Compensation Change: Songul Oden-T (T1000306) - Prgm Mgr IV-5479

1 minute(s) ago - Due 10/02/2015, Effective 09/30/2015

Up Next

Veronica Wayson

Change Job

Due Date 10/02/2015

Review

Details and Process

8. 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.
- 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.

9. The System Task is complete.

## Assign Roles to Worker

The Assign to Worker task is a “To Do” that displays when a worker leaves a position. When a worker leaves a job, there may be a need to assign that worker’s roles to another worker.

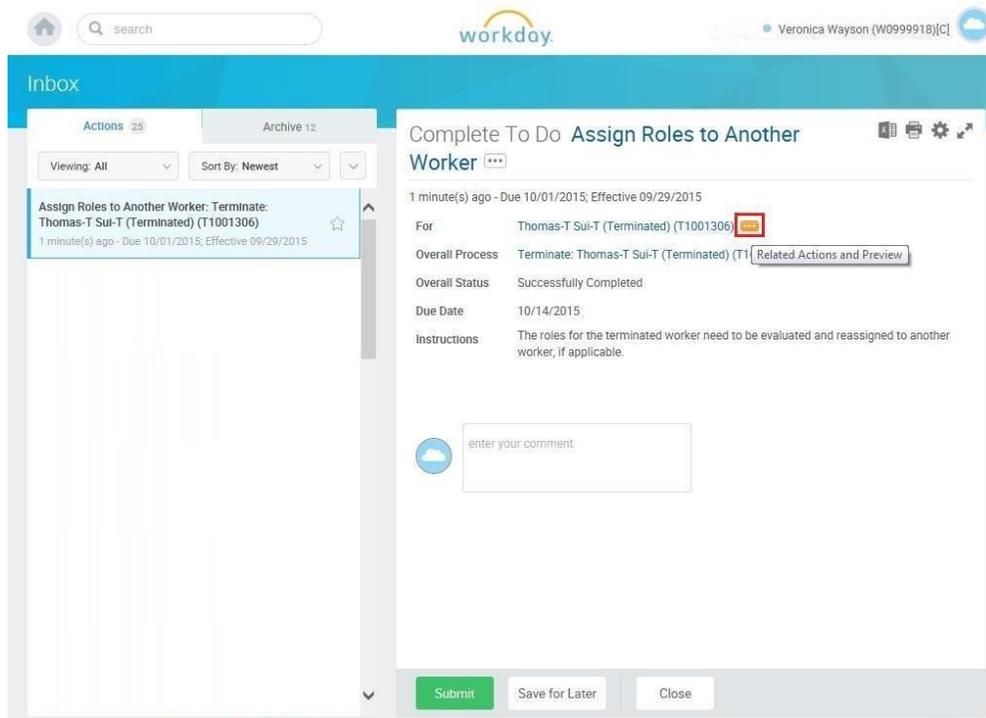
If the worker’s role is assigned to more than one person, it may not be necessary to assign roles to another worker.

The procedure to assign roles to another worker follows.

### Procedure:

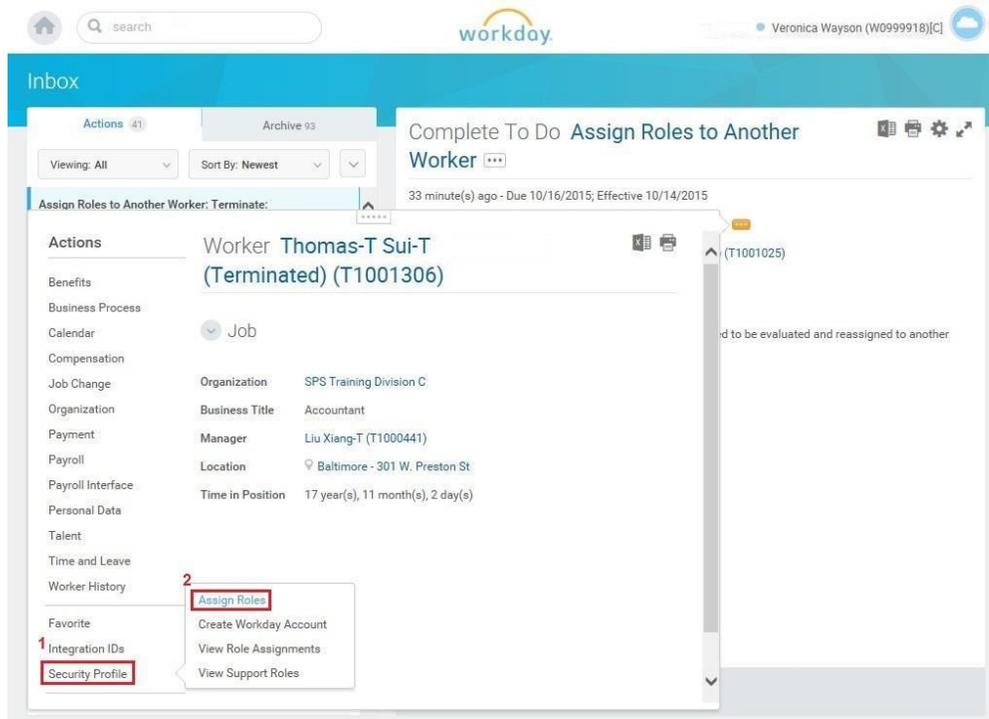
1. Click the **Inbox**  icon.
2. Click the **Inbox**  hyperlink.

### Inbox



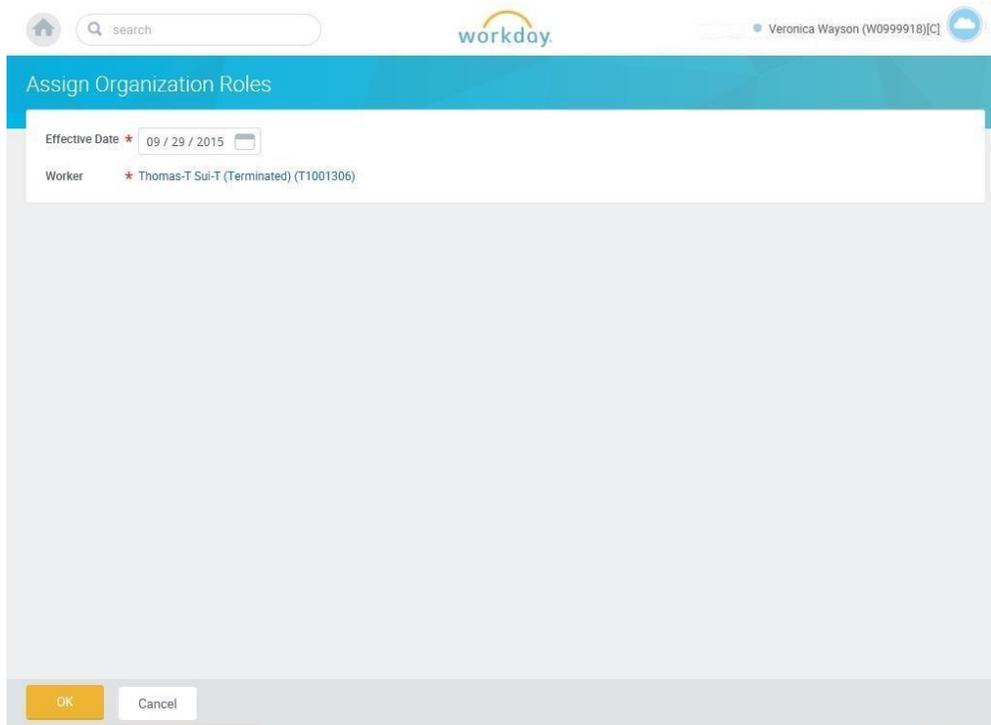
3. Click the Related Actions and Preview  icon next to the worker's name.

## View Worker



4. In the menu, hover over the Security Profile and click Assign Roles.

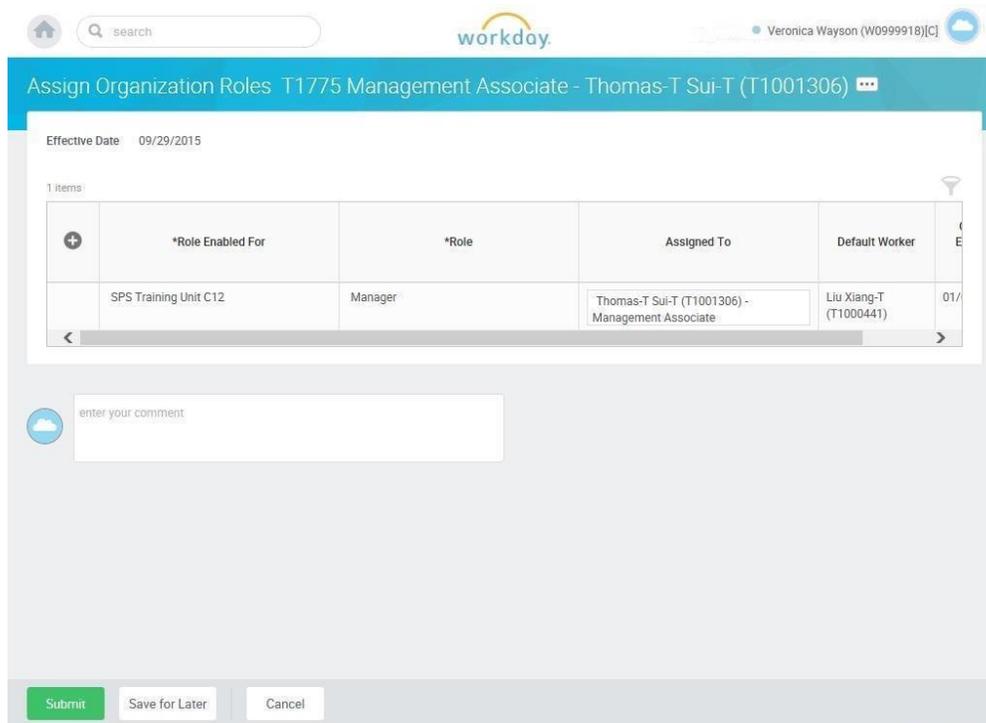
## Assign Organization Roles



The screenshot shows a 'Assign Organization Roles' dialog box in the Workday system. At the top, there is a search bar and the user's name 'Veronica Wayson (W0999918)[C]'. The dialog has a blue header with the title 'Assign Organization Roles'. Below the header, there are two fields: 'Effective Date' with a calendar icon and the value '09 / 29 / 2015', and 'Worker' with a red asterisk and the value 'Thomas-T Sui-T (Terminated) (T1001306)'. At the bottom of the dialog, there are two buttons: 'OK' (highlighted in orange) and 'Cancel'.

5. Click the **OK** button.

## Assign Organization Roles



Effective Date: 09/29/2015

1 items

*Role Enabled For	*Role	Assigned To	Default Worker	E
SPS Training Unit C12	Manager	Thomas-T Sui-T (T1001306) - Management Associate	Liu Xiang-T (T1000441)	01/

enter your comment

Submit Save for Later Cancel

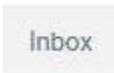
Determining if roles need to be reassigned to another worker:

- When there are no rows, the worker does not have any roles assigned. In this scenario, you would not need to assign roles to another worker. You can click **Cancel**.
  - When a worker is assigned roles, there will be a row for each role that the worker is assigned listed by supervisory organization. In this scenario you should review the **Default Worker** column to review any other workers that would carry out the role in the departing worker's absence. If you determine that a role assignment is necessary, then follow the steps below.
6. Click in the Assigned to column and type the name of the worker for whom you want to assign the role.
  7. Click the **Submit** button once the appropriate names are populated in the Assigned To column.
  8. Click the **Done** button.
  9. The System Task is complete.

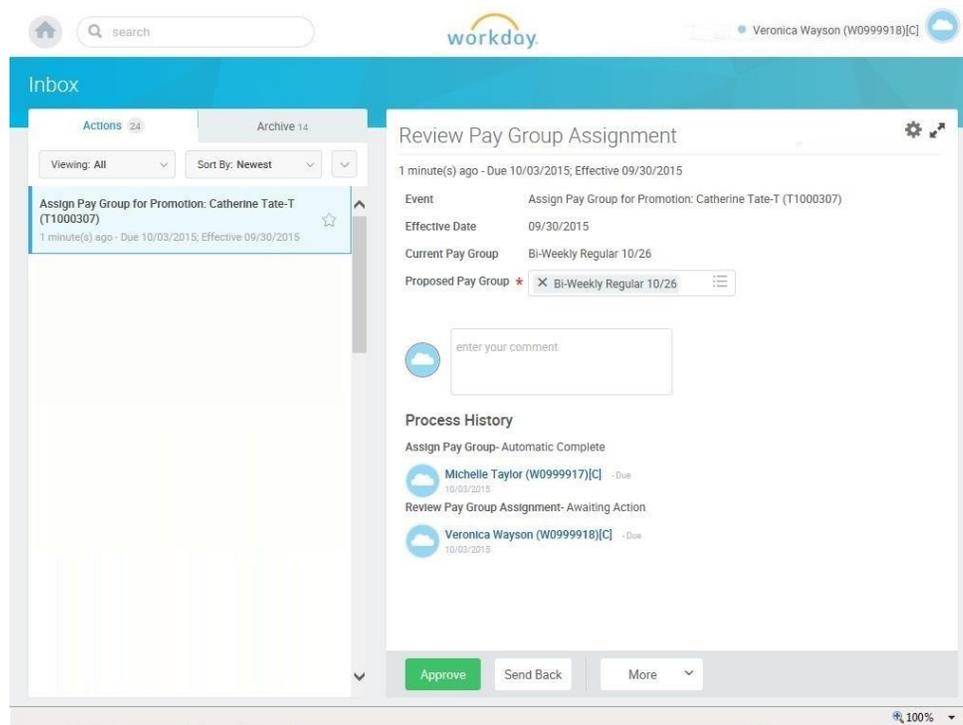
## Assign Pay Group

The Assign Pay Group task requires you to view the default pay group (i.e., Biweekly, Biweekly – Contractual, or Monthly) and change it, if necessary.

### Procedure:

1. Click the **Inbox**  icon.
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.
- 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.

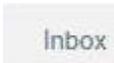
8. The System Task is complete.

## Check the Status of a Business Process

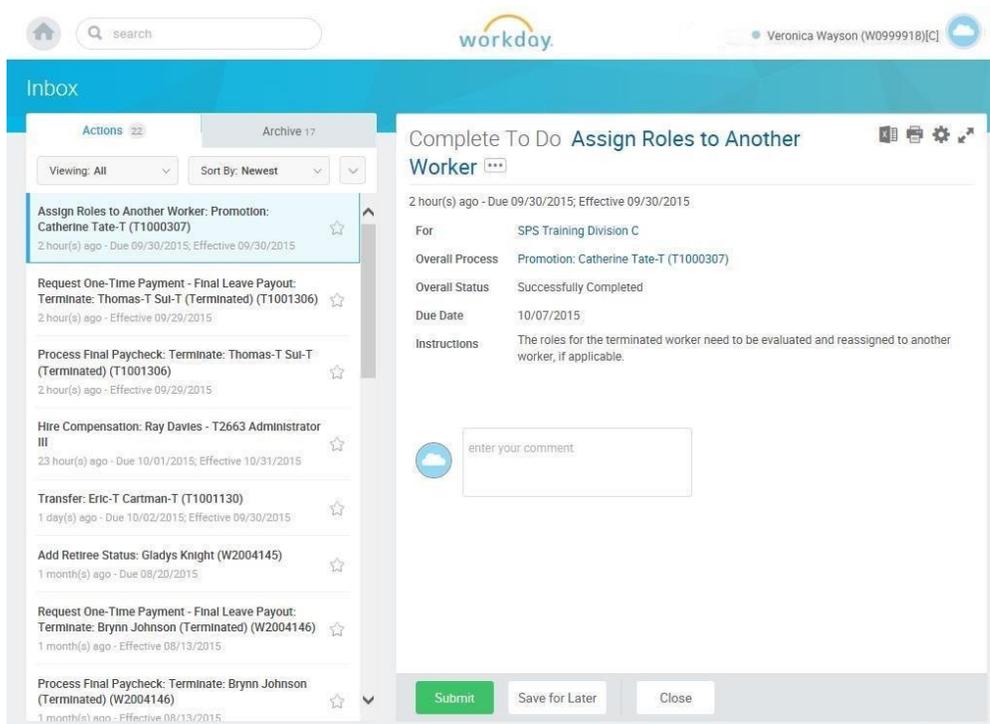
The status of a business process event can be checked at any time by going to the **Archive** tab within the inbox of the person who initiated the event.

The procedure to check the status of a business process event follows.

### Procedure:

1. Click the **Inbox**  icon.
2. Click the **Inbox**  hyperlink.

### Inbox



3. Click the **Archive**  tab.



**Information:** The Archive tab shows all items by you. You can select an item and view the status on the right hand side of the screen.

4. Select the item for which you want to view the status.
5. Review the transaction details on the Details  tab, if desired.

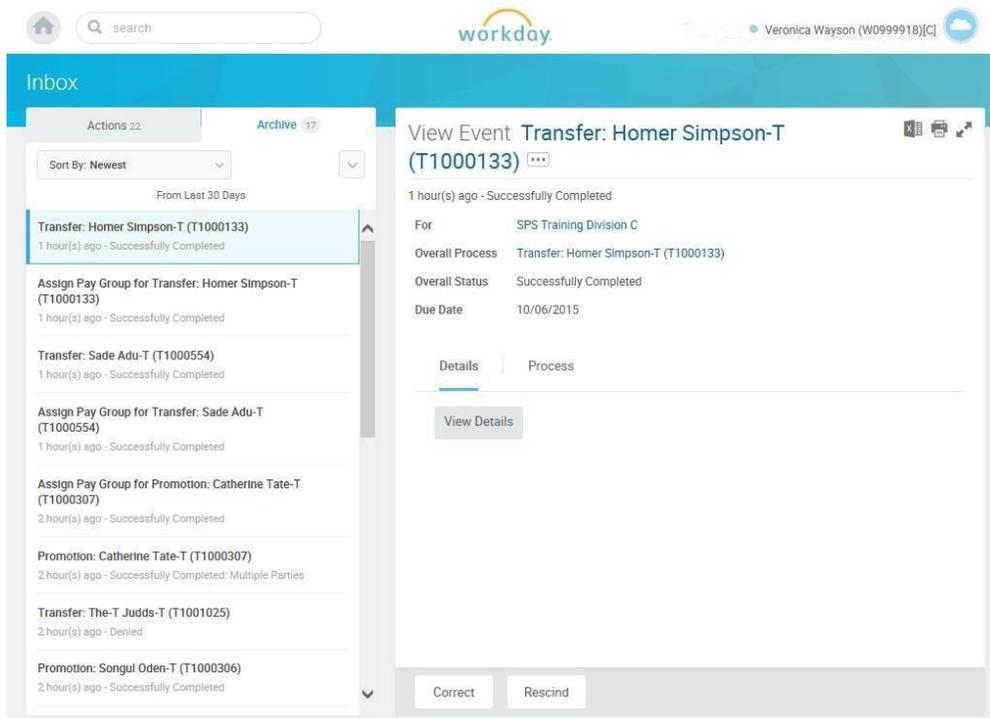
6. Review the Overall Status **Overall Status** field at the top-left side of the transaction page.



**Information:** The overall status of a business displays a:

- “Successfully Completed” when required steps in the process have been completed.
- “In Progress” when there are some tasks awaiting action by someone in the business process routing.

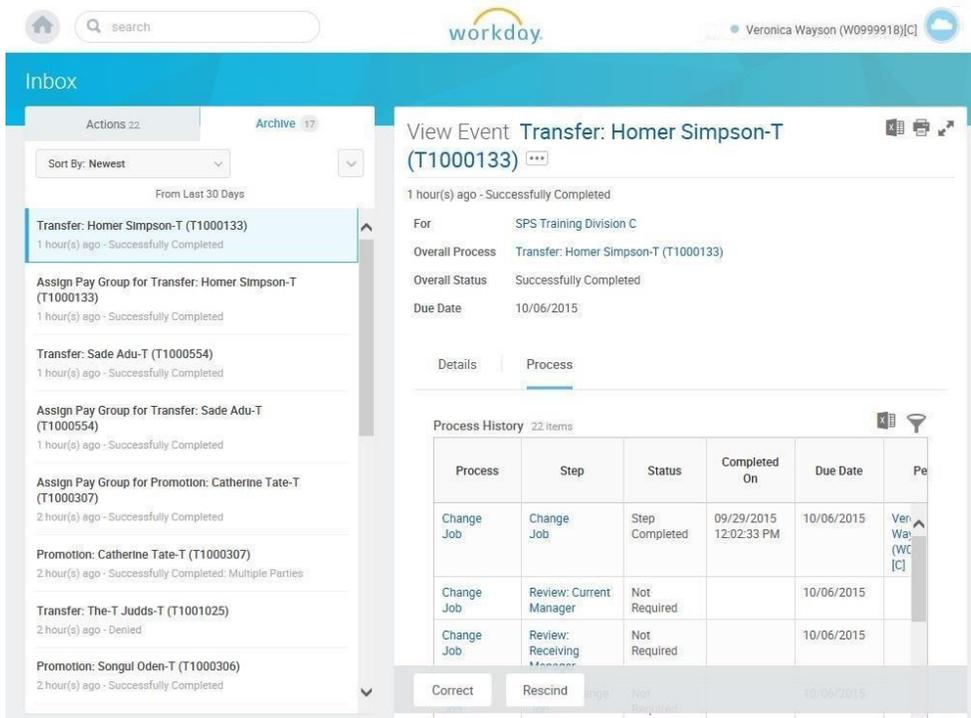
### Inbox



The screenshot shows the Workday user interface. At the top, there is a search bar and the user's name, Veronica Wayson (W0999918). The main area is divided into two sections. On the left is the 'Inbox' with a list of actions, including 'Transfer: Homer Simpson-T (T1000133)', 'Assign Pay Group for Transfer: Homer Simpson-T (T1000133)', 'Transfer: Sade Adu-T (T1000554)', 'Assign Pay Group for Transfer: Sade Adu-T (T1000554)', 'Assign Pay Group for Promotion: Catherine Tate-T (T1000307)', 'Promotion: Catherine Tate-T (T1000307)', 'Transfer: The-T Judds-T (T1001025)', and 'Promotion: Songui Oden-T (T1000306)'. On the right is a 'View Event' window for 'Transfer: Homer Simpson-T (T1000133)'. This window shows the event details: '1 hour(s) ago - Successfully Completed', 'For: SPS Training Division C', 'Overall Process: Transfer: Homer Simpson-T (T1000133)', 'Overall Status: Successfully Completed', and 'Due Date: 10/06/2015'. There are tabs for 'Details' and 'Process', and a 'View Details' button. At the bottom of the event view, there are 'Correct' and 'Rescind' buttons.

7. To view the status of individual tasks in a business process, click the Process **Process** tab.

**Inbox**



The screenshot shows the Workday interface. At the top, there is a search bar and the user's name, Veronica Wayson (W0999918)[C]. The main area is divided into two panes. The left pane is the 'Inbox' with a list of actions sorted by 'Newest' from the last 30 days. The right pane is a 'View Event' window for 'Transfer: Homer Simpson-T (T1000133)'. It shows the event is 'Successfully Completed' and provides details like 'For: SPS Training Division C', 'Overall Process: Transfer: Homer Simpson-T (T1000133)', 'Overall Status: Successfully Completed', and 'Due Date: 10/06/2015'. Below the details is a 'Process History' table with 22 items.

Process	Step	Status	Completed On	Due Date	Pe
Change Job	Change Job	Step Completed	09/29/2015 12:02:33 PM	10/06/2015	Ver Wa (WC [C])
Change Job	Review: Current Manager	Not Required		10/06/2015	
Change Job	Review: Receiving Manager	Not Required		10/06/2015	

8. Review the status, which steps have been completed/not completed, and who has the step for the action.

9. The System Task is complete.