STATEWIDE PERSONNEL SYSTEM

Change Job – Transfer

November 2014

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Change Job – Transfer

Business 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.

Step	Process Steps	Role	Description
1	**Initiate Transfer in JobAps via the Hire Details Page***	Recruiter (Proposed Agency)	Complete the Hire Details Page, including: - Action = Transfer - Enter the W# for the worker being transferred - Start Date = the effective date of the transfer - Position = the Workday Position number the worker is being transferred into
2a	**Initiate Change Job – Transfer in Workday***	HR Coordinator (Current or Proposed Agency)	Enter job change data in Workday, including : - new manager and supervisory organization - reason (see Events and Reasons section) - new position - other job details, as needed. **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.
2b	**Review JobAps Data***	HR Coordinator (Proposed Agency)	Review job change data from JobAps, including: - new manager and supervisory organization - reason (see Events and Reasons section) - new position - other job details, as needed.
3	**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.
4	**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.
5	**Assign Pay Group***	HR Coordinator (Proposed Agency)	Assign pay group for job change. **NOTE:** If the employee has multiple jobs, assign pay group for position change.
6	**Manage Business Processes for Worker***	HR Coordinator (Current Agency)	If employee has pending tasks assigned, assign tasks to another worker.

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 to select one of the following reasons when initiating a job change on a worker:

Event	Reason	Description
Transfer	Transfer – Independent Agency	Transfer an employee to a Non SPMS Agency in Workday.
	Transfer – Intra Agency	Transfer an employee to a supervisory organization within the same Agency in Workday.
	Transfer – Other Agency	Transfer an employee to another SPMS Agency in Workday.
	Transfer – Reassignment in Same Agency	Transfer an employee reassignment to another position and supervisory organization within the same Agency in Workday.
	Transfer – JobAps-Indep Agency*	Initiate an employee transfer to a Non-SPMS 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.

NOTE: Reasons marked with an asterisk (*) indicate that a transfer was submitted as a result of a JobAps recruitment. Reasons associated with these transactions will be selected automatically when the Change Job process is initiated by JobAps and will not be selected manually.

Before you begin…
You will need the following information to complete the Change Job 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 manager, supervisory org, FTE %, and other details to assist with the job change.

Review Transfer Initiated by JobAps

(Completed by Proposed HR Coordinator)

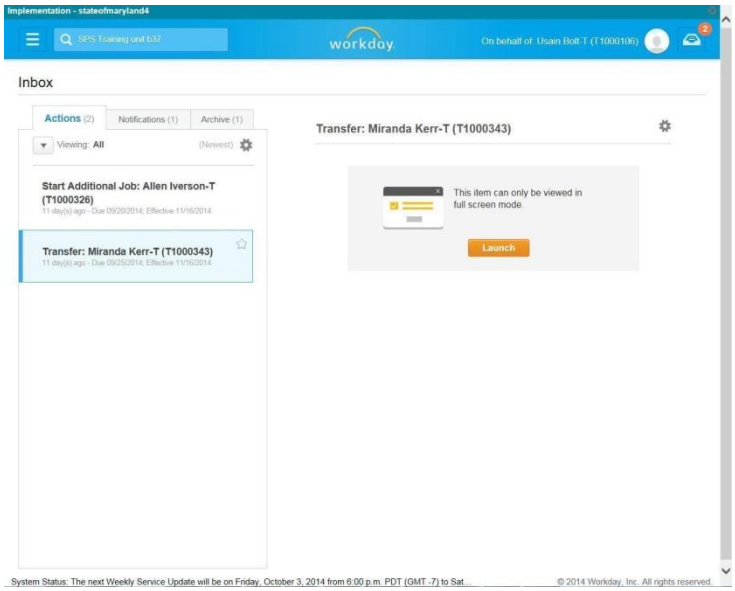
When a transfer occurs as a result of recruitment in JobAps, the HR Coordinator from the receiving Agency will have a required action in their Inbox to review and approve job change data. After the approval and submission, all other steps in the Change Job business process will follow.

The procedure to review transfer from JobAps follows. If you need to complete a transfer that is not recruited in JobAps use the "Initiate a Transfer in Workday" procedure in this guide.

Procedure:

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

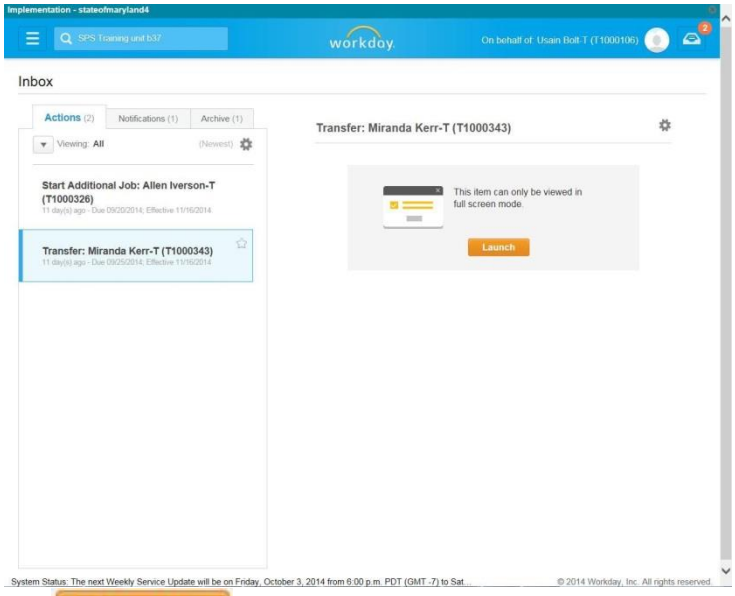
Inbox



3. Click the "Transfer" task in your inbox (e.g., "Transfer: Jane Doe (W1234567)").

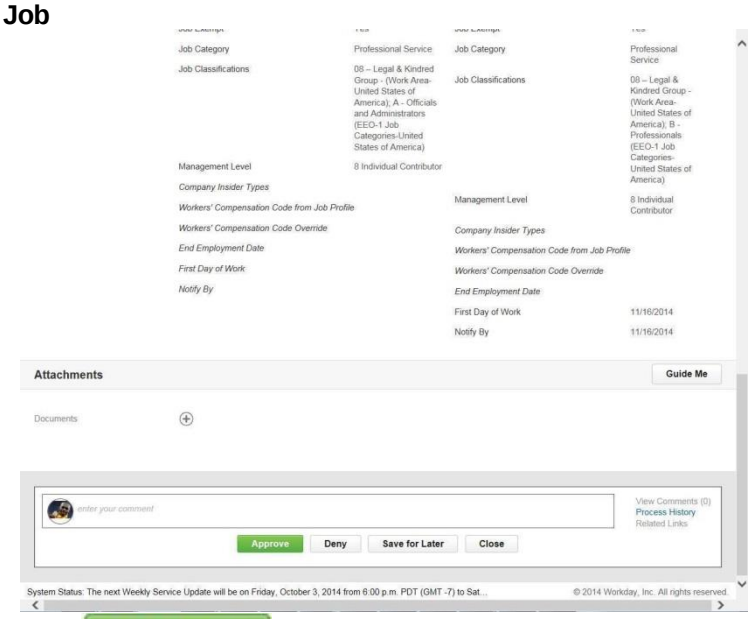
Tip: The employee's name that you are performing the job change on displays in the task name.

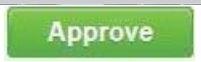
Inbox



4. Click the **Launch** hyperlink.
5. Review the current and proposed information for the employee (i.e., for the transfer, promotion, or voluntary demotion).
6. Click the Add a New Row icon to add an attachment, if applicable.
    - Select the appropriate **Document Category.**
    - Click the **Attach** button, browse and select document to attach.

Review Change Job

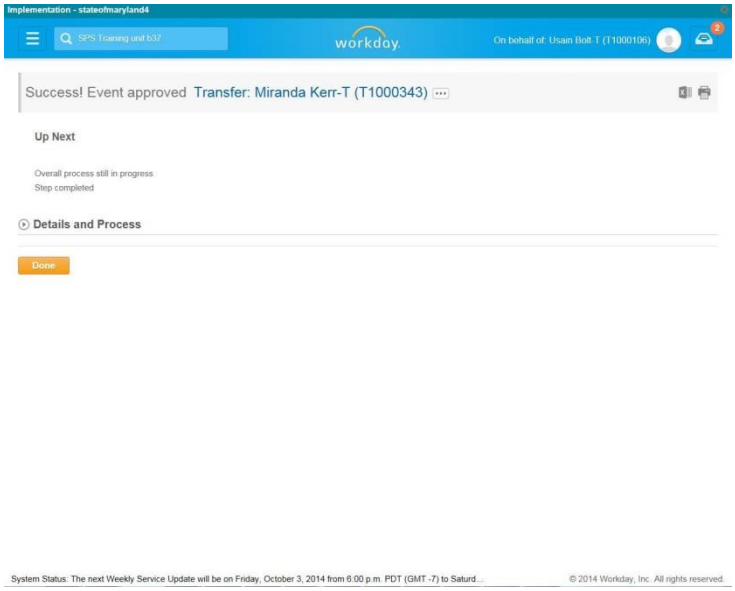


7. Click the **Approve**  button.

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

- Click Deny to reject the job change intiated from JobAps.
- Click **Save for Later** to save your changes but not submit.
- Click **Close** to return to your inbox and review the transaction at a later time.

Review Change Job



8. Take note of the next step.

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 and take action on other tasks in the process.

9. Click the Done

button. You will retrieve the next task from your inbox.

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.

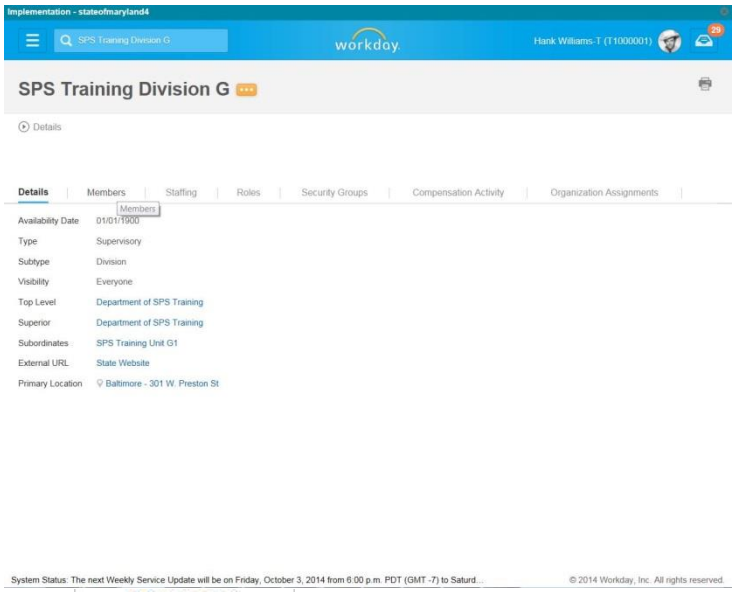
Procedure:

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.

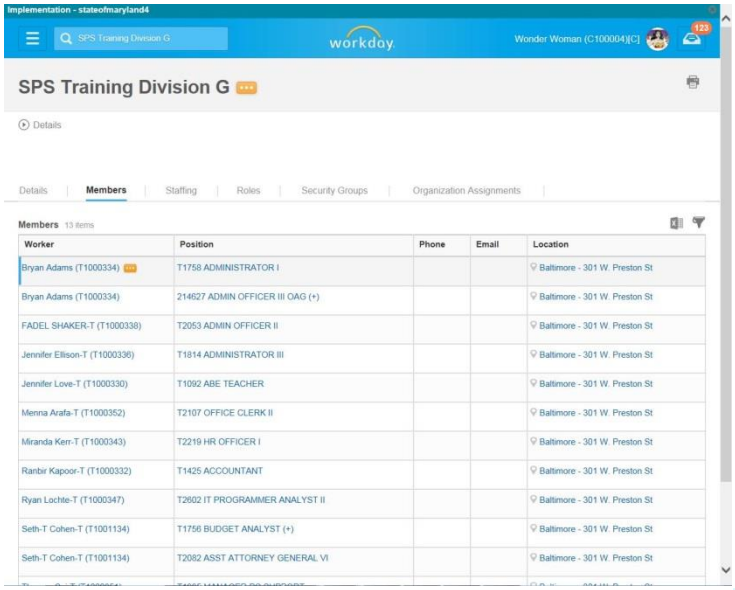
2. Click the **Search** icon.
3. Click the Supervisory Organization hyperlink.

Supervisory Organization Details



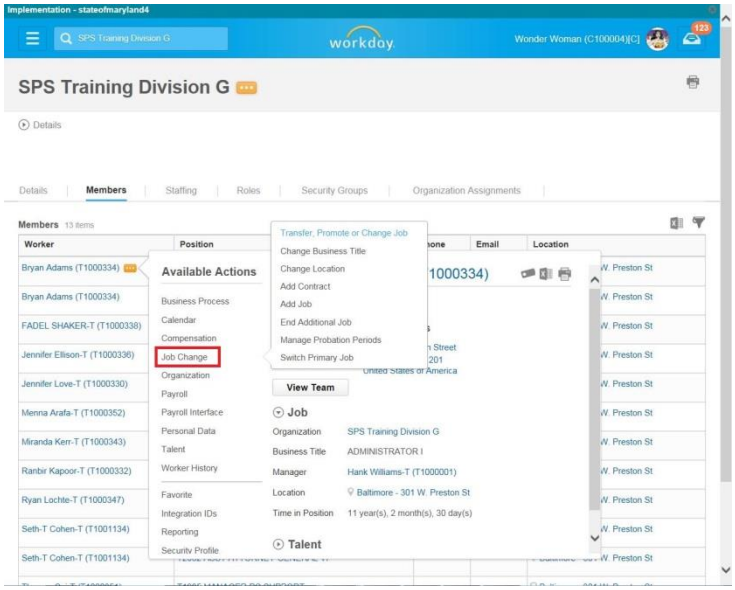
4. Click the **Members** Members tab button.

Organization Members



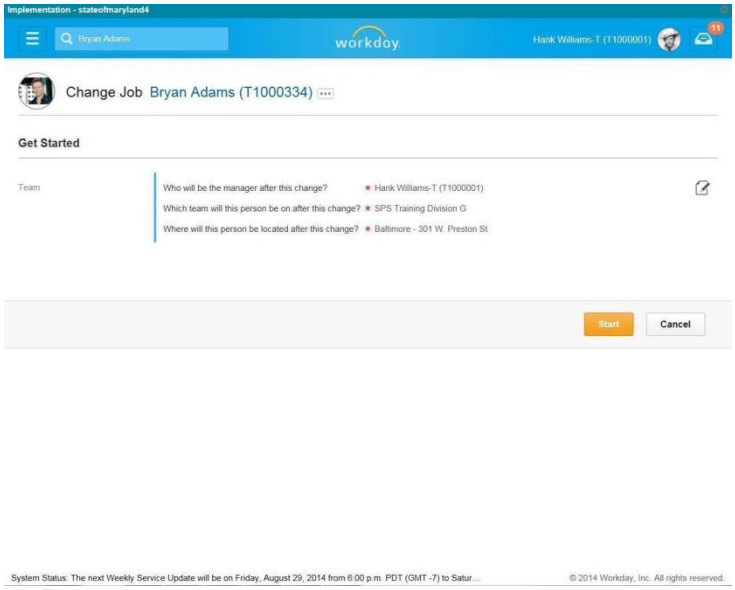
5. Identify the employee you want, then click the Related Actions and Preview icon next to the employee's name.

Organization Members



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

Change Job

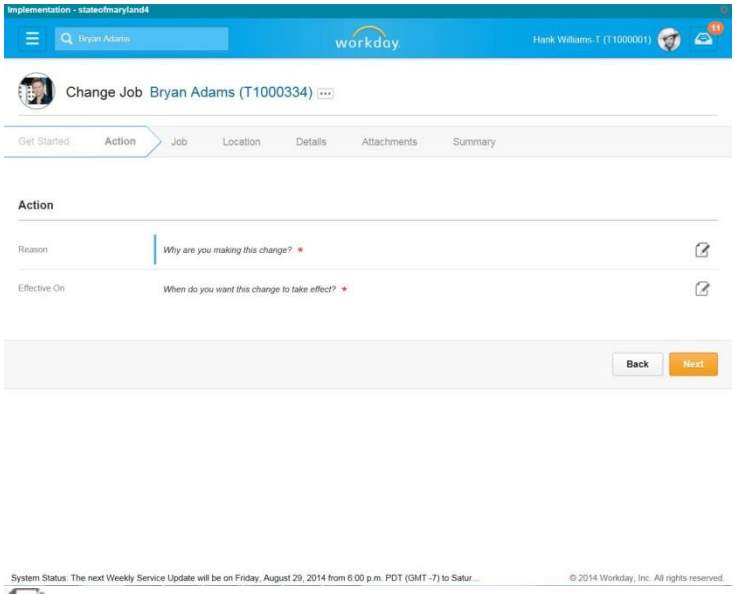


7. Click the Edit icon to update the following fields on the **Start** page:.
   - Who will be the manager after this change? (Enter new manager's name.)
   - Which team will this person be on after this change? (Use the Prompt to Review/Enter Supervisory Org.)
   - Where will this person be located after this change? (Review/Enter Primary Job location or Supervisory Org)

Information: The Supervisory Org and Location default 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.

Change Job

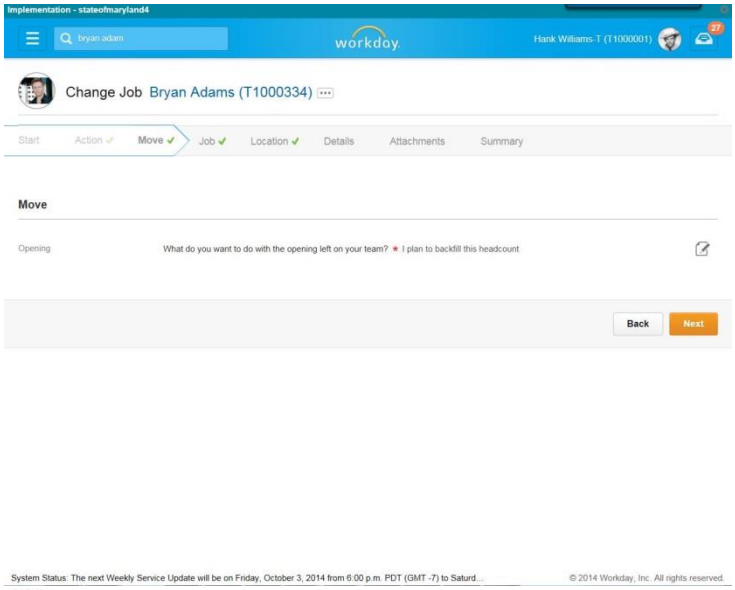


9. Click the Edit icon to update the following fields on the **Action** page:

- Why are you making this change? (Enter one of the event reasons below.)
    - Transfer – Independent Agency (to a Non-SPMS agency)
    - Transfer – Intra Agency (to a sup org within the same Agency)
    - Transfer – Other (to another SPMS Agency)
    - Transfer – Reassignment in the Same Agency (reassignment to another position within the same Agency)
- When do you want this change to take effect? (Enter the effective date, e.g., pay date)

10. Click the Next button.

Change Job



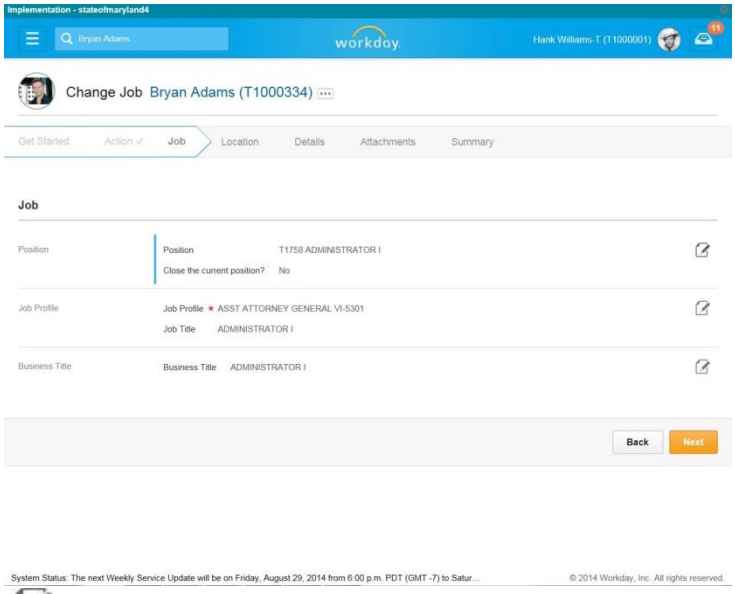
11. Click the Edit icon to review/update the following field on the **Move** page:

- What do you want to do with the opening left on your team?

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

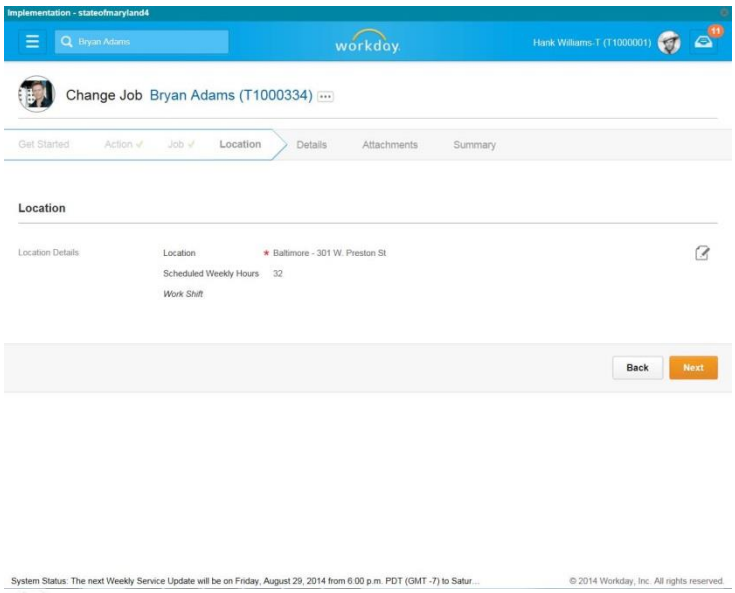
12. Click the Next button.

Change Job



13. Click the Edit icon to update the following fields on the **Job** page:
    - **Position** (Use the Prompt to select the position in which the employee is moving)
    - **Job Profile** (do not change; defaults from position)
    - **Job Title** (do not change; default from position)
    - **Business Title** (Working Title; change, if desired.)
14. Click the **Next** button.

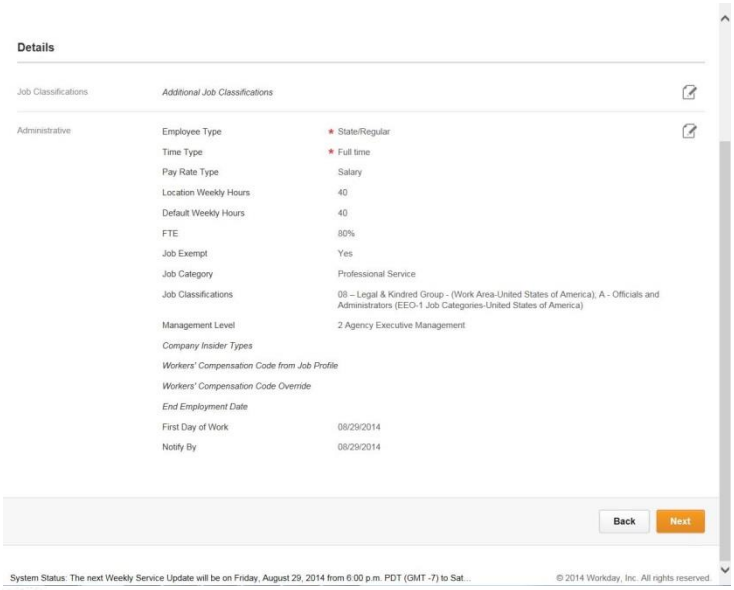
Change Job



15. Click the Edit icon to update the following fields on the Location page, if applicable:
    - **Scheduled Weekly Hours** (update if making a worker FTE change)

16. Click the **Next** button.

Change Job



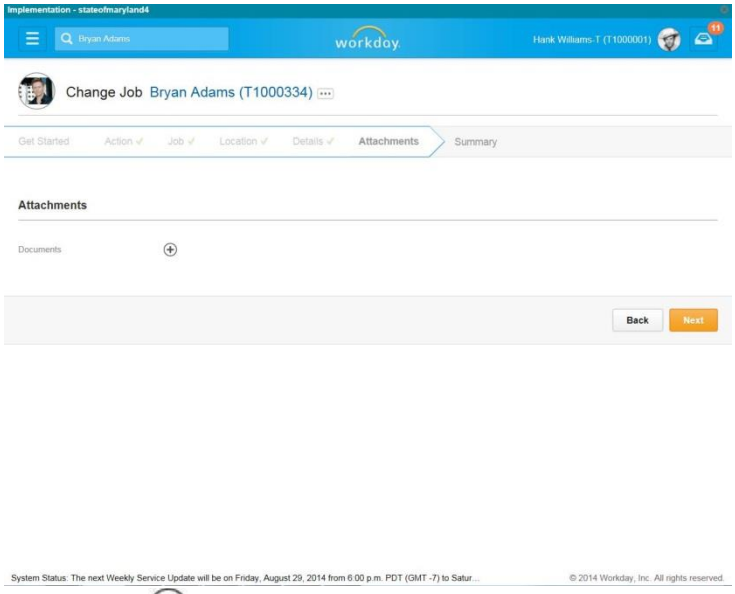
17. Click the Edit icon in the Administrative section of the **Details** page to update the following fields, if applicable:

    - **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 selections.

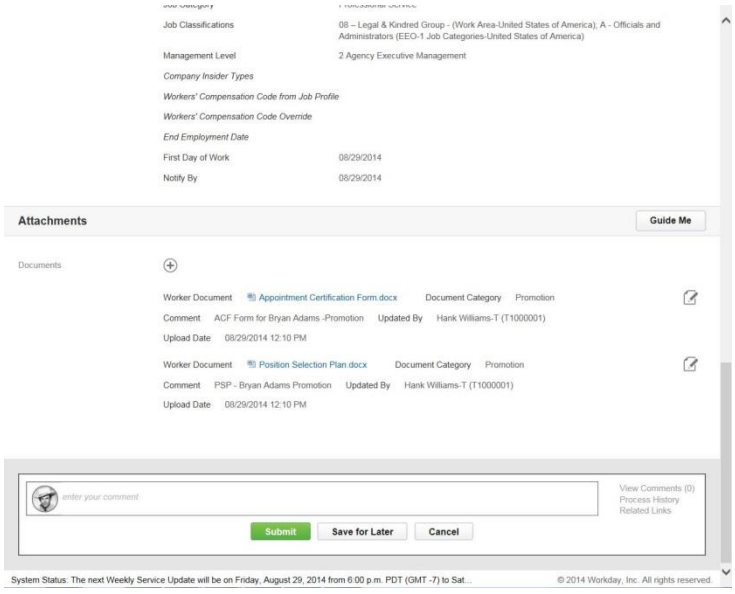
18. Click the **Next** button.

Change Job



19. Click the Add a New Row ⊕ icon to add an attachment, if applicable.
    - Select the appropriate **Document Category**
    - Click the **Attach** button, browse and select a document to attach.
20. Click the **Next** button.

Change Job



21. 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.

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

Information: The transaction will route via the step identified in the Business Process Overview.

23. The System Task is Complete.

Assign Roles to Another Worker
(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. 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 OPSB 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.

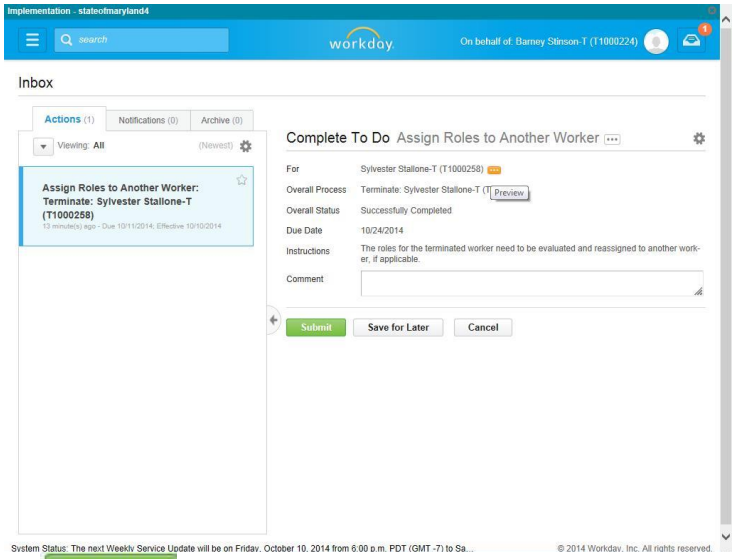
NOTE: If a worker's role is assigned to more than one person, it may not be necessary to assign roles to another worker.

The procedure to mark the "Assign Roles to Another Worker" task as completed in your inbox follows.

Procedure:

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

Inbox



3. 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

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.

4. The System Task is complete.

Assign Pay Group

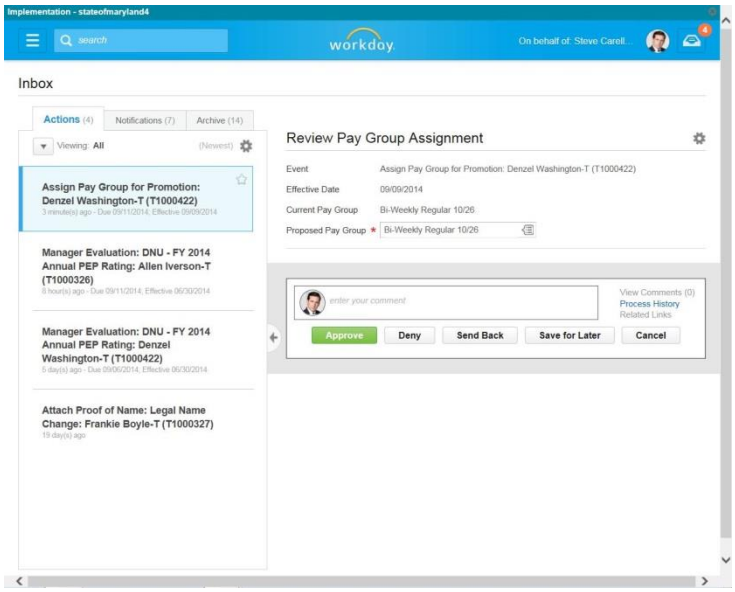
(Completed by Proposed HR Coordinator)

The Assign Pay Group task requires you to view the default pay group (i.e., Biweekly – 10/26, Biweekly – 10/21, Biweekly - Contractual, or Monthly – 30/12) and change it, if necessary.

Procedure:

1. Click on the inbox icon
2. Click on the View 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 workers name and employee ID.
4. Click on the arrow to collapse 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 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 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.

Manage Business Processes for Worker

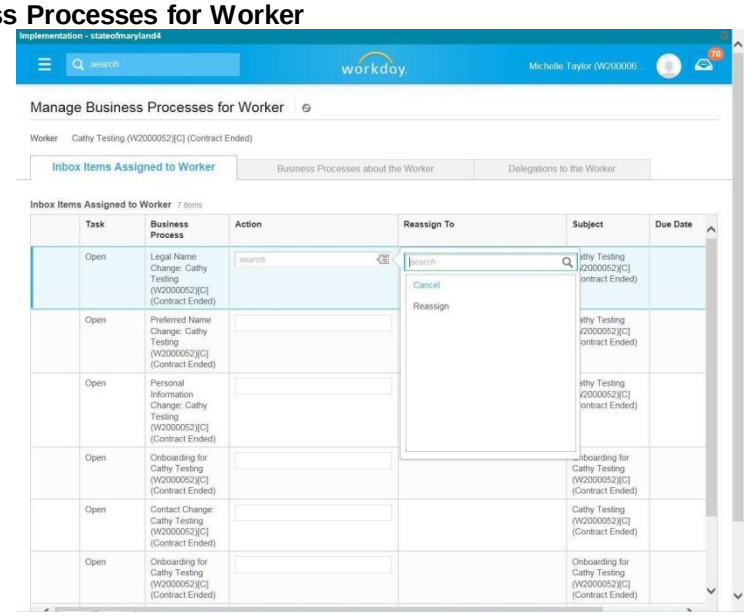
(Completed by Current HR Coordinator)

The Manage Business Processes for Worker task is used when there are pending tasks for a worker that is leaving a position. This process allows you to reassign or cancel business processes for the terminated worker.

Procedure:

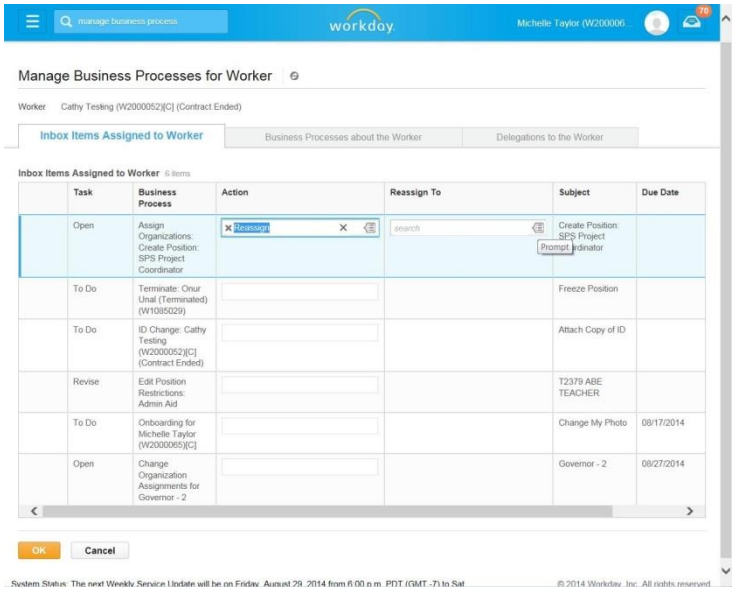
1. Click the Inbox icon.
2. Click the **View Inbox** hyperlink.
3. Click the assigned task from you action list.
4. Click the arrow to collapse the inbox.
5. To cancel or reassign tasks, click on the "Inbox Items Assigned to Worker" tab.

Manage Business Processes for Worker



6. In the Action column, type or select the prompt to either an action (i.e.), cancel or reassign).

Manage Business Processes for Worker



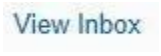
7. If you are reassigning the task, type or use the prompt to select the reassigned worker.
8. Click the **OK** button.
9. Click the **Submit** hyperlink.
10. Click the **Done** hyperlink.
11. The System Task is complete.

Check the Status of a Business Process

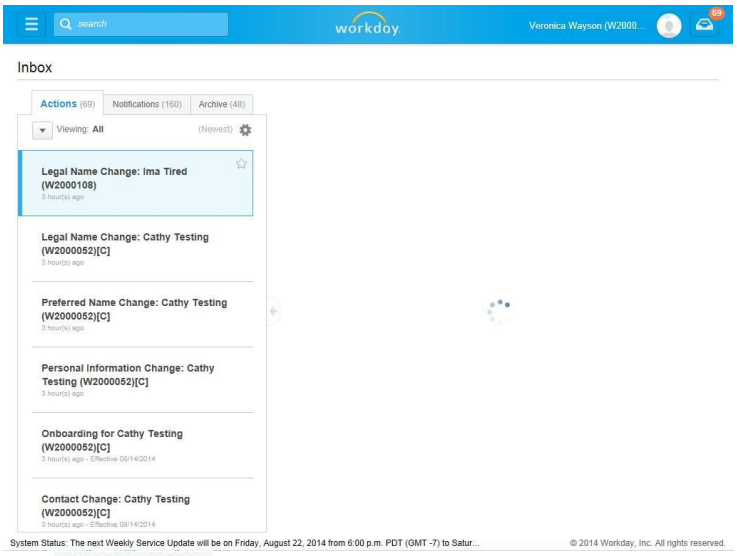
The status of a business process event can be checked at any time by going to the **Archive** tab within the Inbox of the person who initiated the event.

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

Procedure:

1. Select the Inbox button.
2. Click the **View Inbox**  hyperlink.

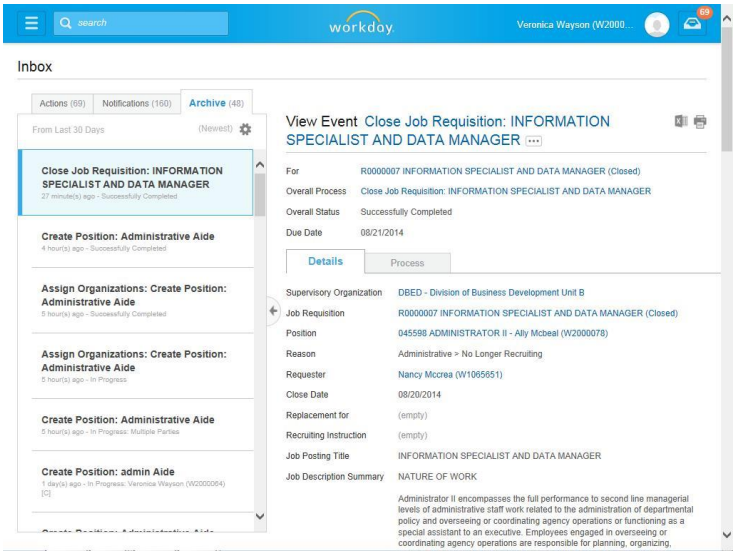
Inbox



3. Click the **Archive** tab.

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

Inbox

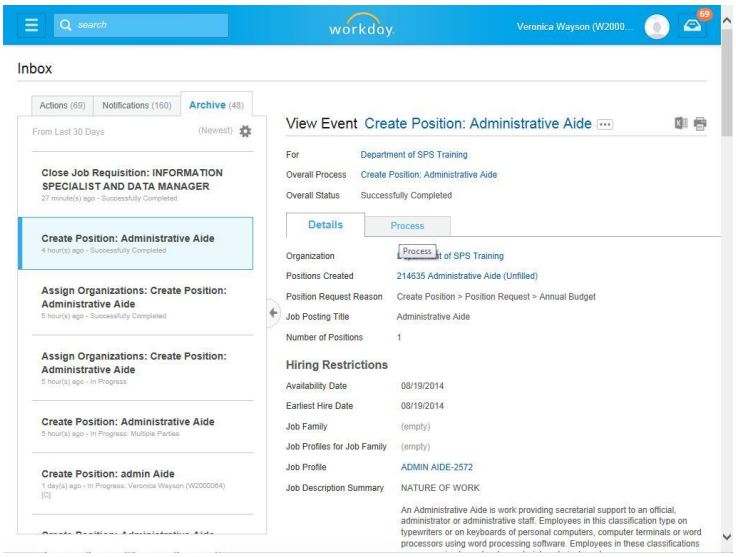


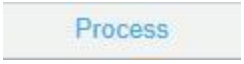
4. Select the item for which you want to view status.
5. Review the transaction details on the Details tab, if desired.
6. Review the Overall Status field at the top-left side of the transaction page.

Information: The overall status of a business process displays as….

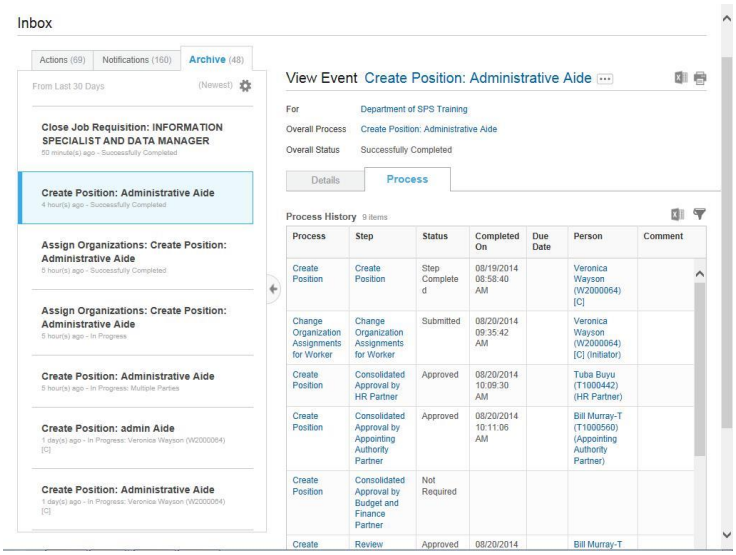
- "Successfully Completed" when required steps in the process are have been completed.
- "In Progress" when there are some tasks awaiting action by someone in the business process routing.

Inbox



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

Inbox



8. Review the status, which steps have been completed/not completed and who has the step for action.
9. The System Task is complete.