STATEWIDE PERSONNEL SYSTEM

Change Job - Transfer

October 2015

Contents

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: - 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: - 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: - New manager and supervisory organization - Reason (see Events and Reasons section) - New position - Other job details, as needed
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 Agency)	Assign pay group for the job change. NOTE: If the employee has multiple jobs, assign pay group for position change.

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
	Transfer – End of Temporary Duty	End the 6 months temporary duty (e.g., temporary employee).
	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 – JobAps-Independent 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
	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).

NOTE: Reasons marked with an asterisk (*) indicate that a transaction (i.e., promotions, voluntary demotions, and transfers) 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. You will not select these reasons manually.

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.

Review Transfer Initiated by JobAps

(Completed by Proposed HR Coordinator

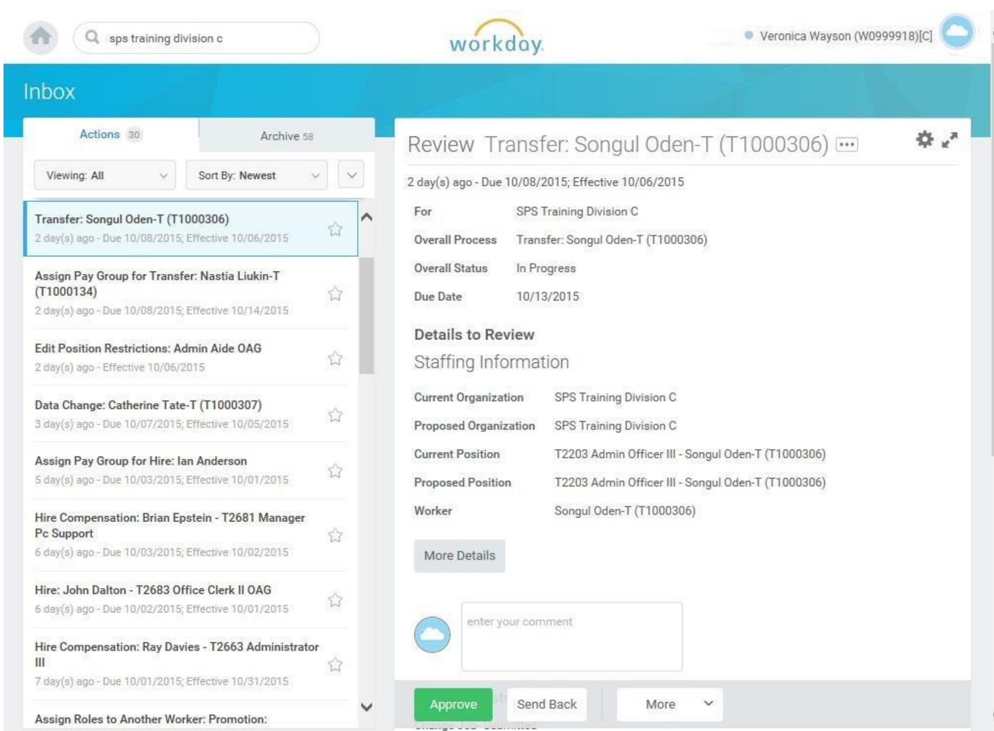
When a promotion, voluntary demotion, or transfer occurs as a result of recruitment in JobAps, you will receive a required action in your inbox. All job change data is entered automatically when the Change Job process is initiated by JobAps. The HR Coordinator needs to review this information and approve.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

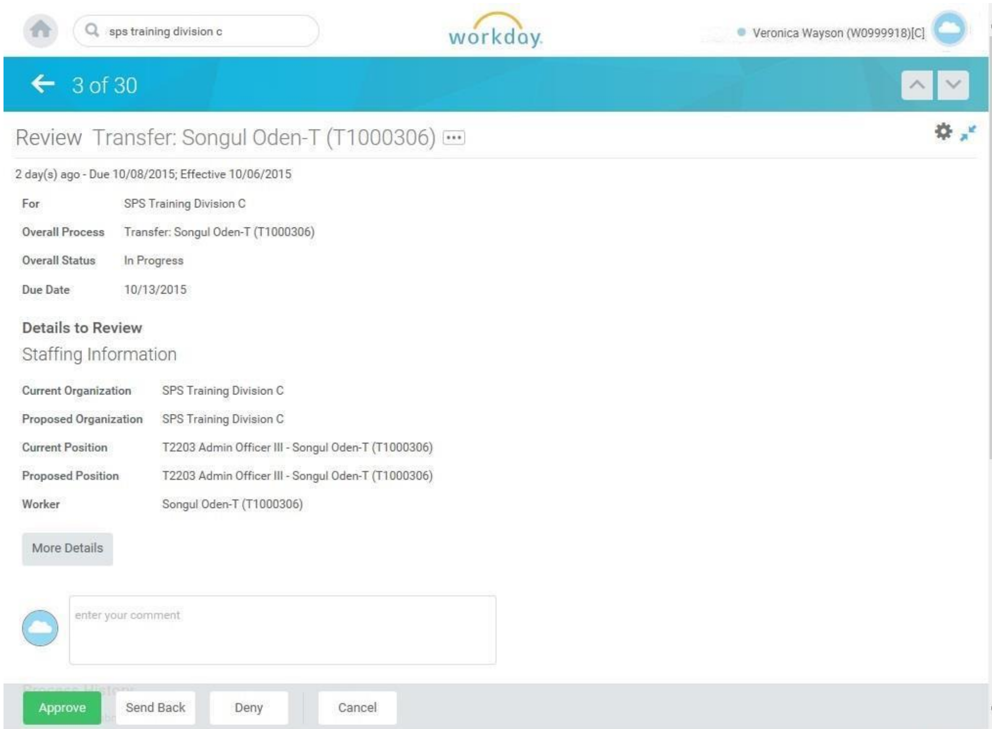
1. Click the **Inbox** icon.
2. Click the **Inbox** Inbox hyperlink.

Inbox



3. Click the Change Job task in your inbox (e.g., Transfer Songul Oden-T (T1000306).
4. Click the arrows to expand the window.

Inbox



5. Click on the More Details 

button to review the information.

6. 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 initiated in 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.

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.

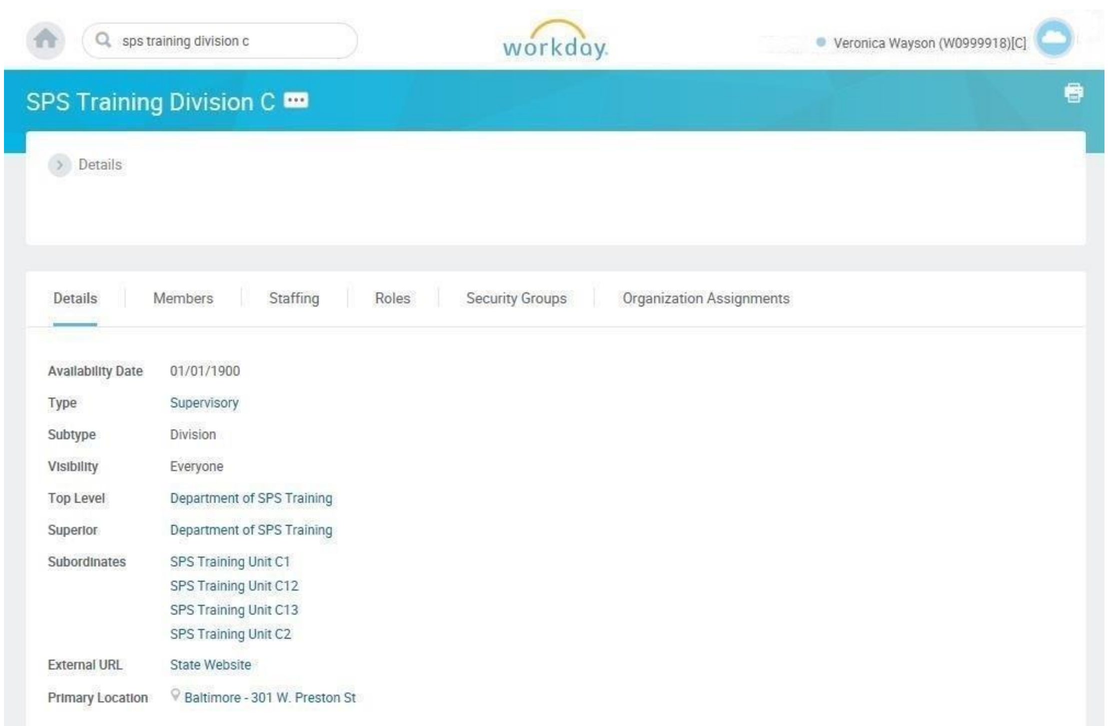
Procedure:

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.

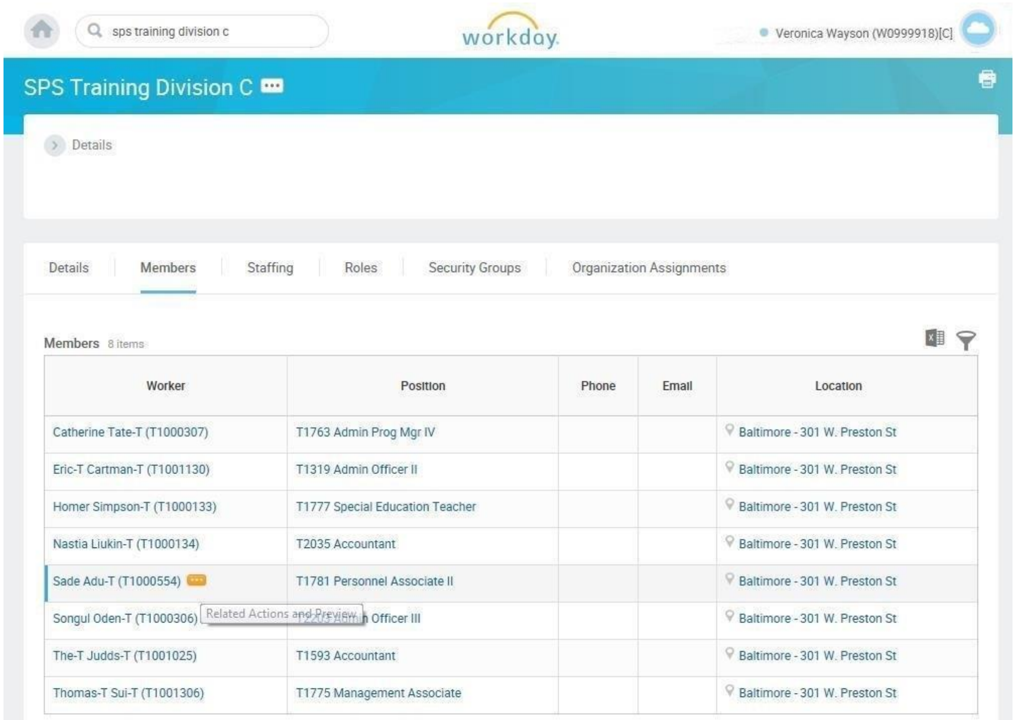
Supervisory Organization Details



4. Click the **Members** 

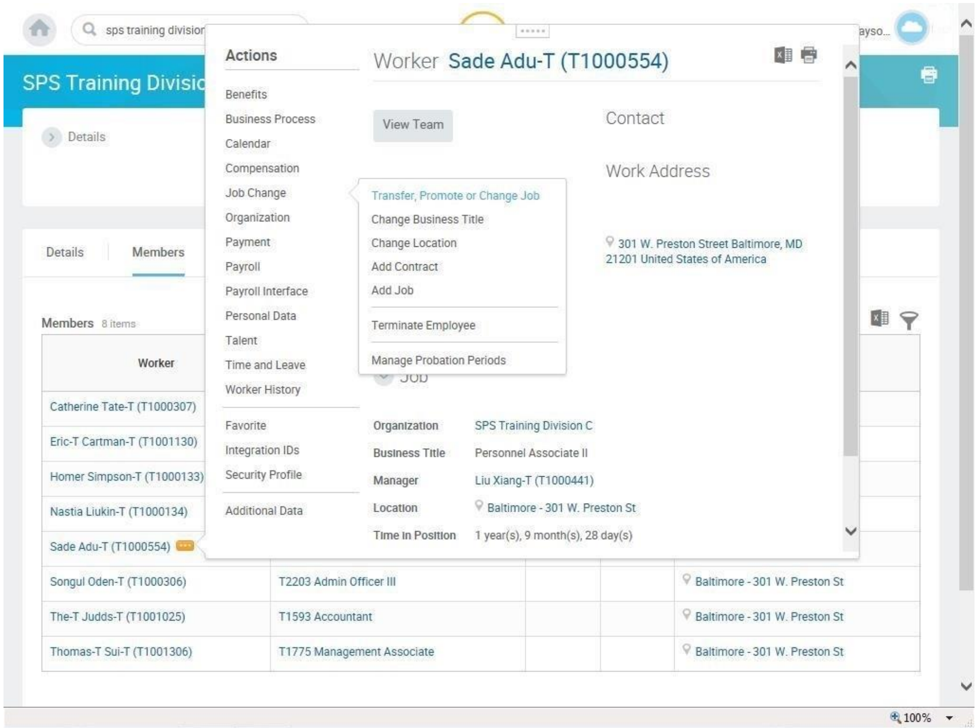
tab.

Organization Members



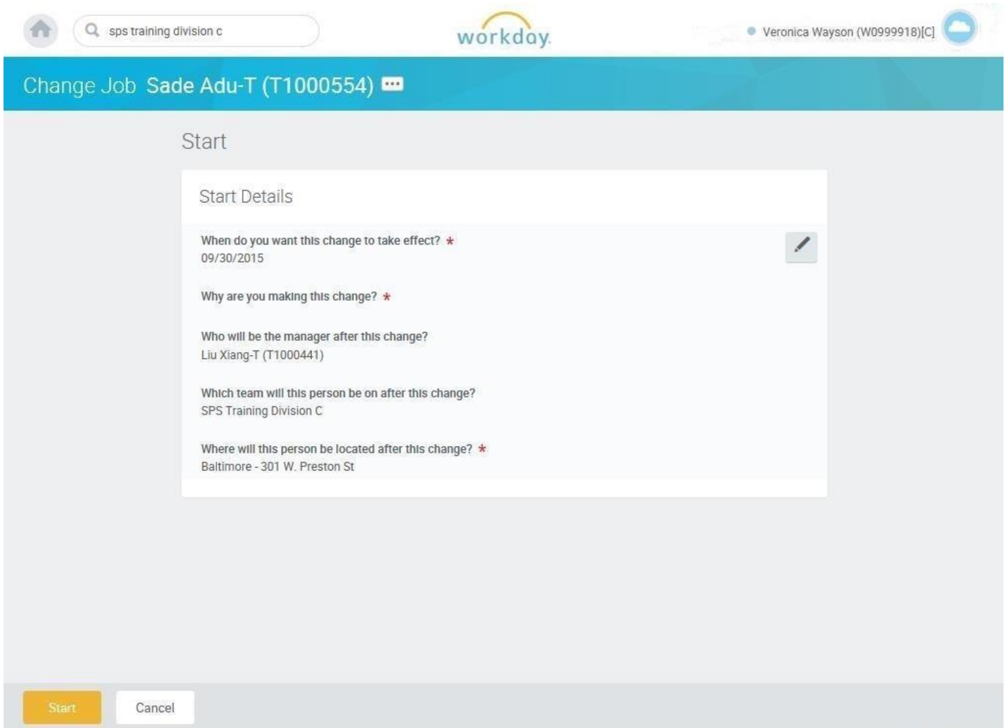
5. Identify the employee you want, then click the Related Actions and Preview icon next to the employee's name.

Organization Members



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

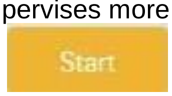
Change Job



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

- When do you want the 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 permanent PIN)
    - Transfer – End of Temporary Duty
    - Transfer – Indep Agency (to a Non-SPMS 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? (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.

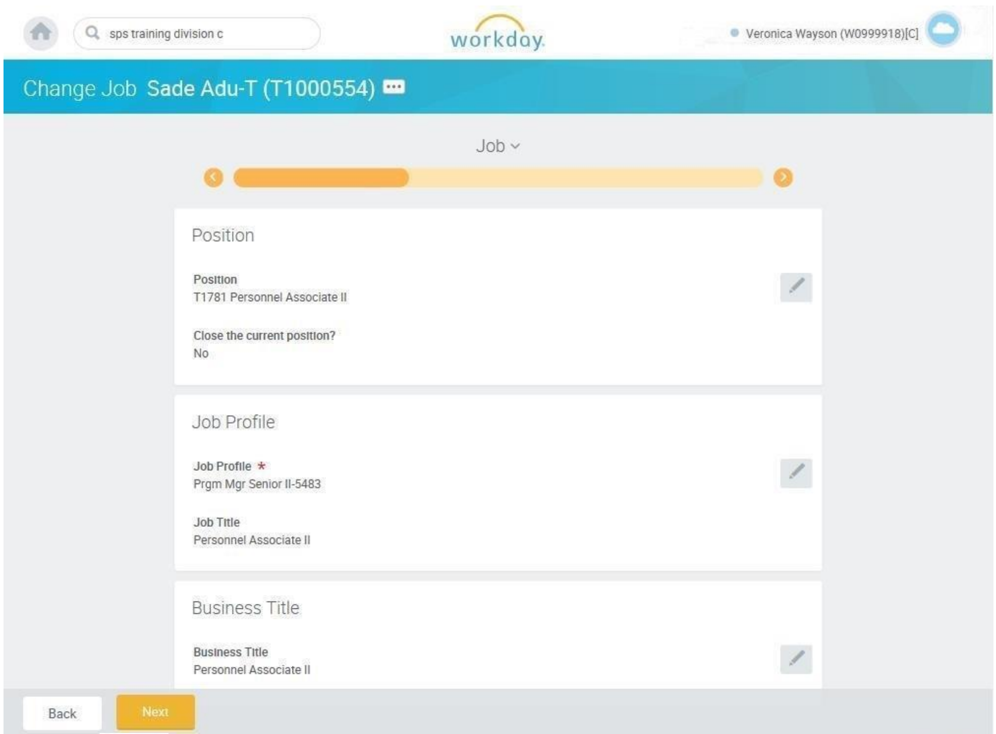
9. If an employee will have a new manager as a result of the job change, the Move Page displays.

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

Change Job

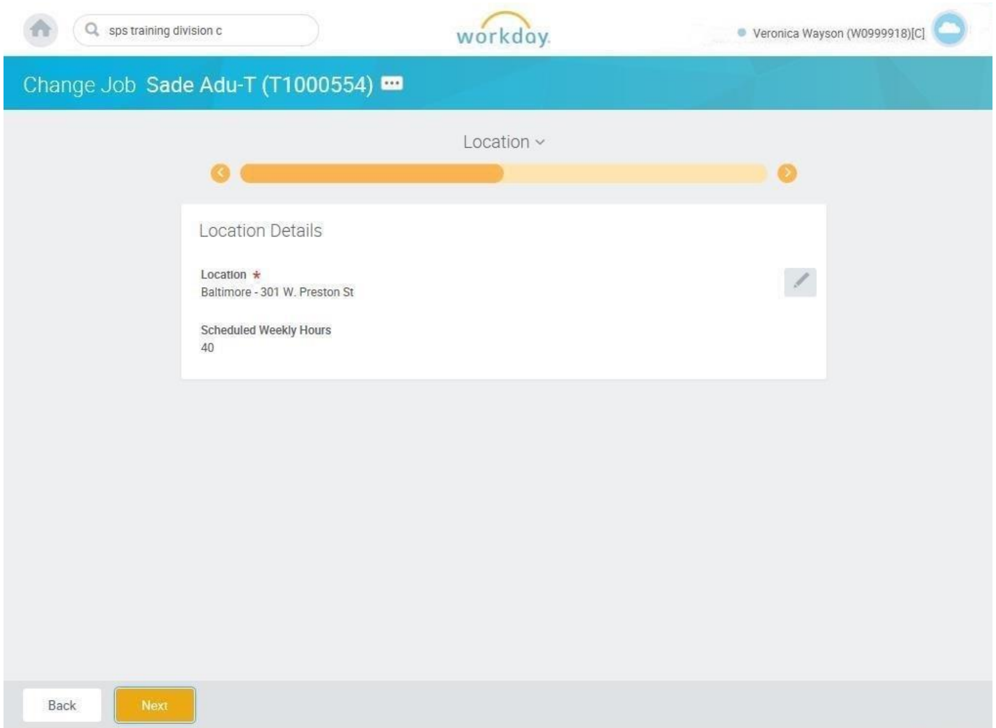


10. Click the Edit icon to update the following fields on Job page, if applicable:

- 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

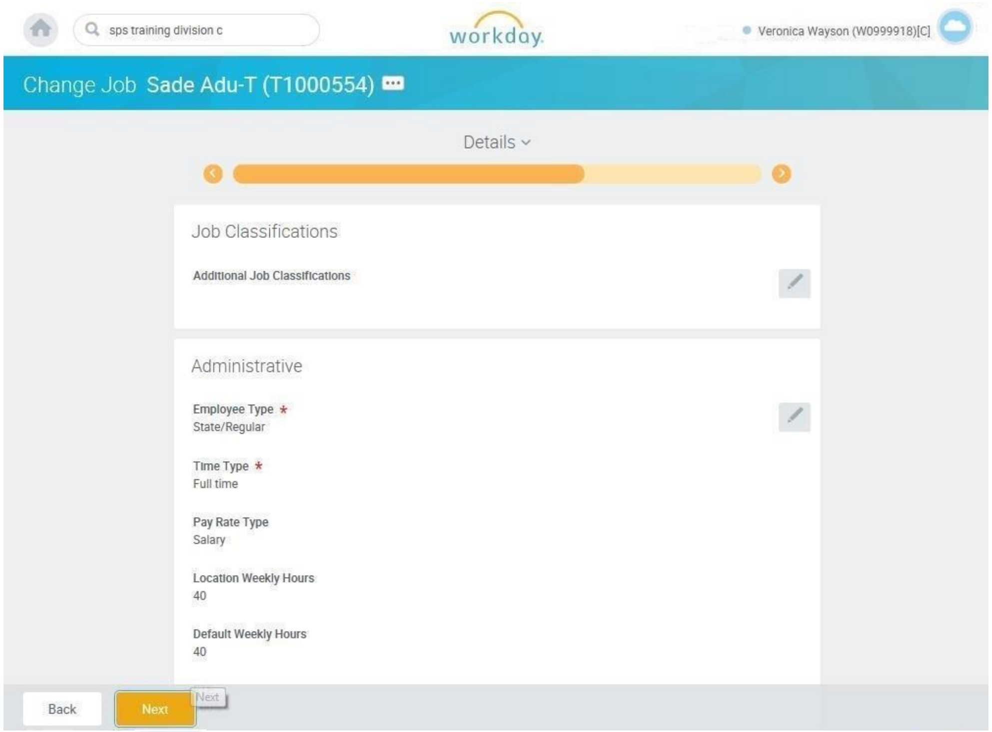


12. Click on the Edit  icon to update the following fields on Location page, if applicable:

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

13. Click the **Next**  button.

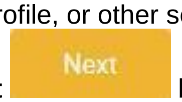
Change Job



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

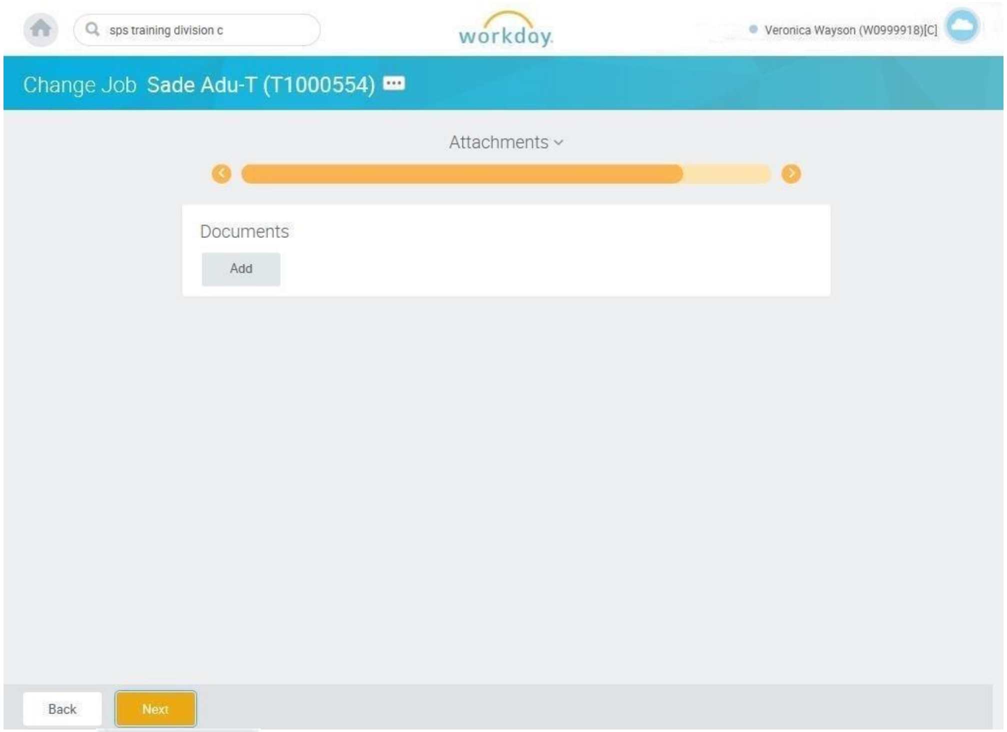
    - Time Type (example: part-time/full-time, for FTE changes; this may also default from the position selected.

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



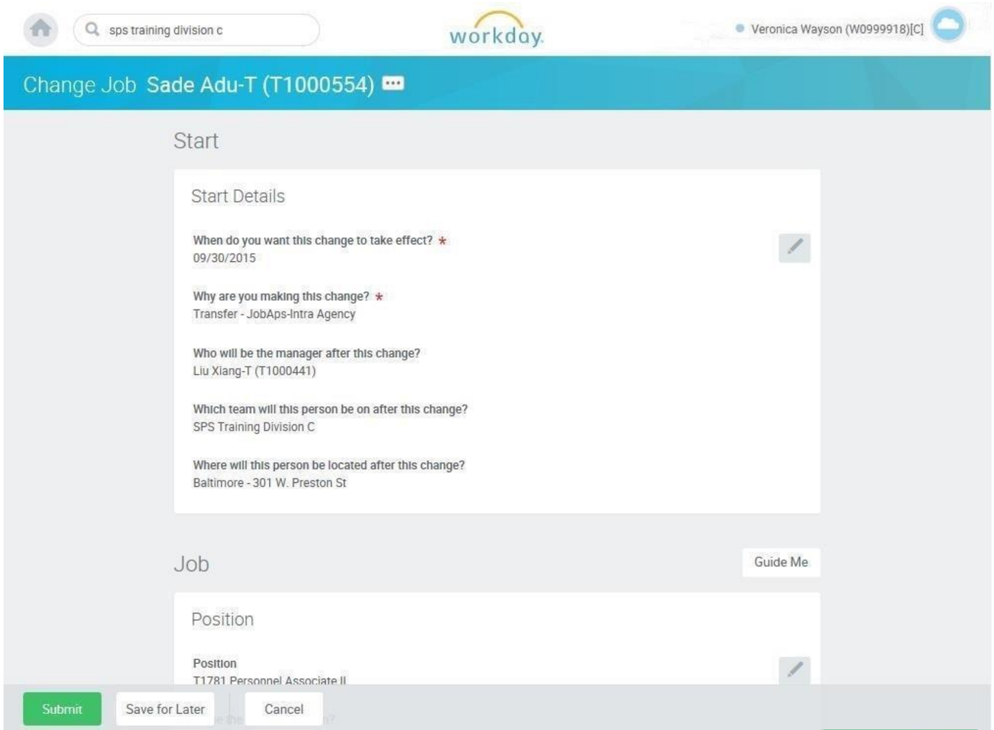
16. Click on the  button to add an attachment, if applicable.

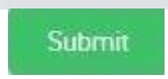
- Select the appropriate **Document Category**.
- Click the **Attach** button, browse and select a document to attach.

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

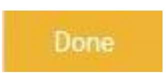


18. Review your entries on the Summary page. When you are done, click the 

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.

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.

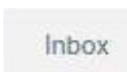
Do one of the following…

- If it is determined that there is a need to assign a role(s) to another worker,
    a. Complete the **Application and Authorization for 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.

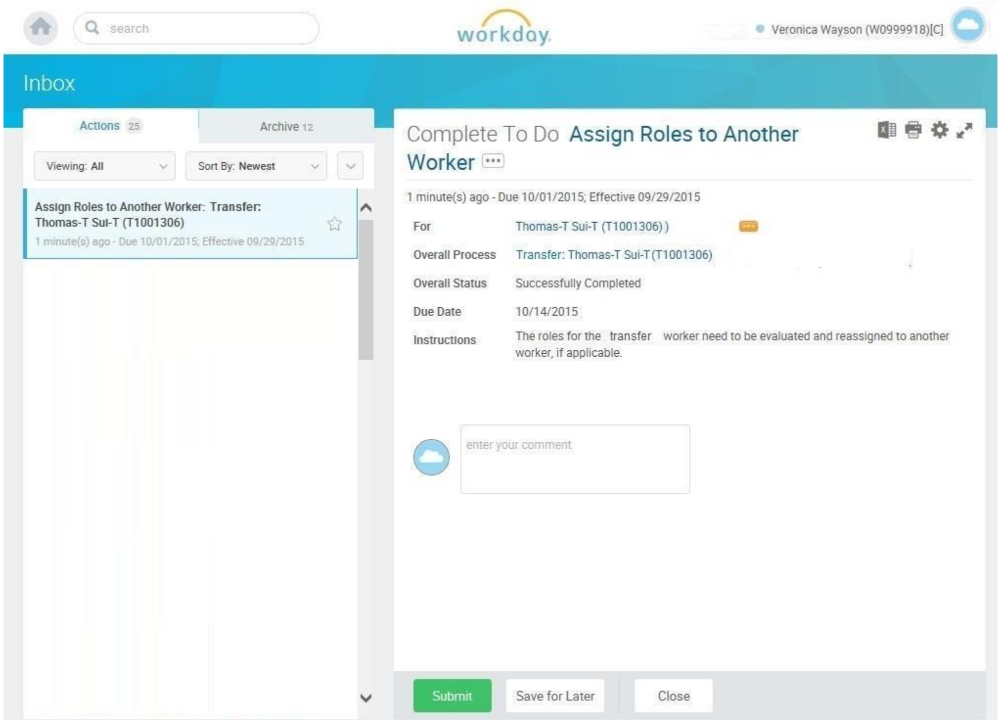
The procedure to assign roles to another worker follows.

Procedure:

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

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 **Close** 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 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

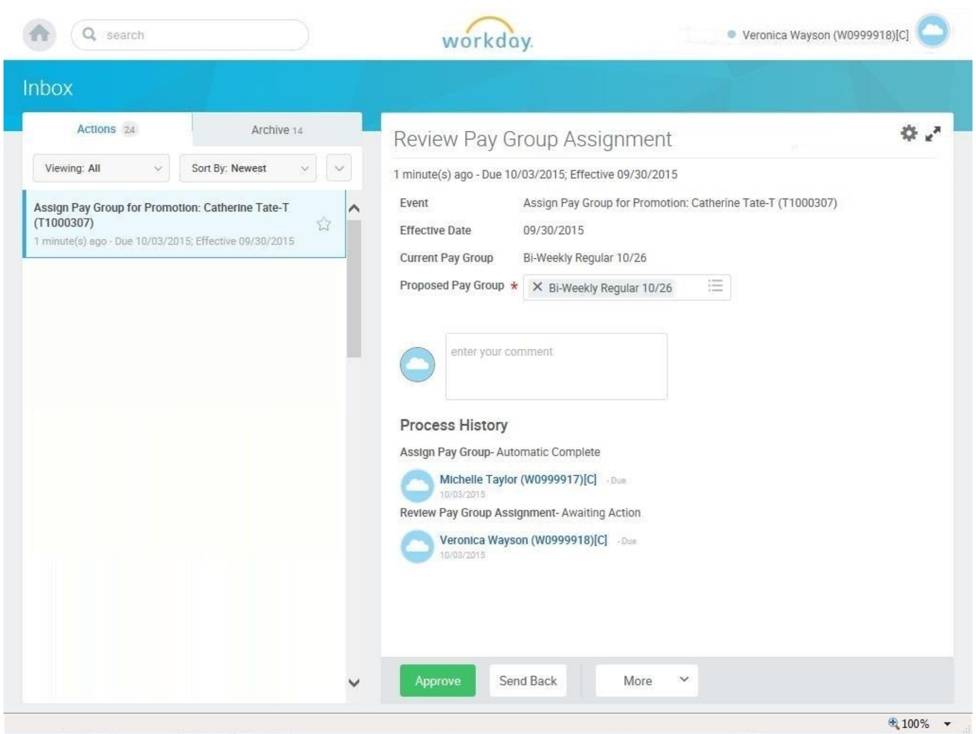
(Completed by Proposed HR Coordinator)

The Assign Pay Group task requires you to view the default pay group (i.e., Biweekly, 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** Approve button.

7. Click the **Done** 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.

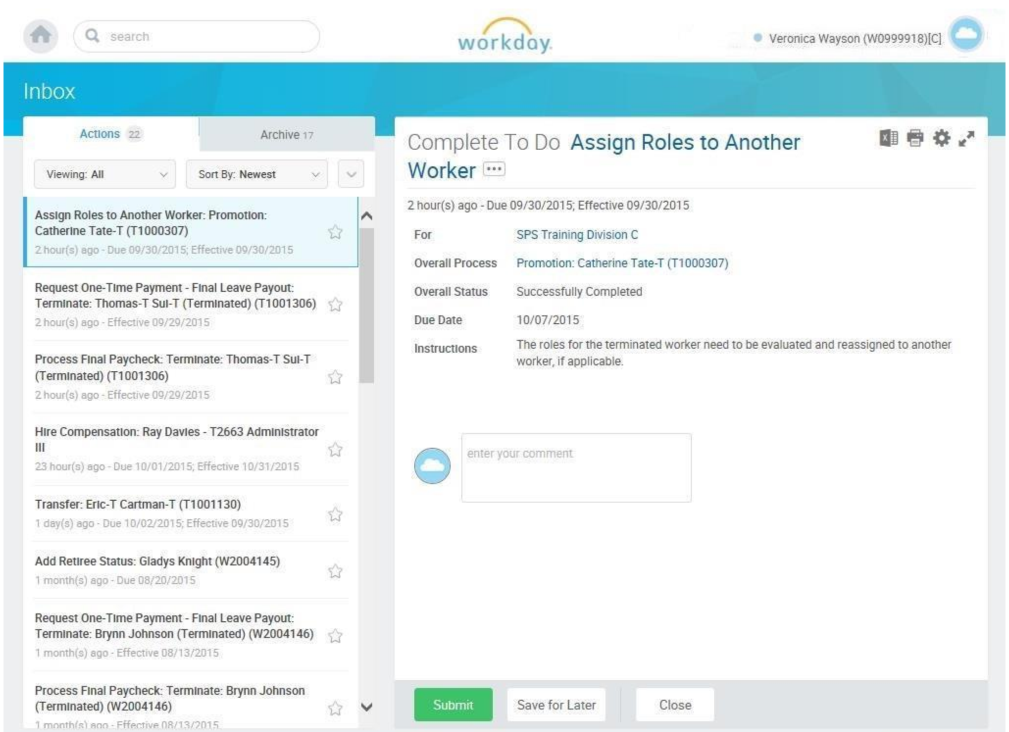
The procedure to check the status of a business process event follows.

Procedure:

1. Click the **Inbox**  icon.

2. Click the **Inbox** Inbox hyperlink.

Inbox



3. Click the **Archive** 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.

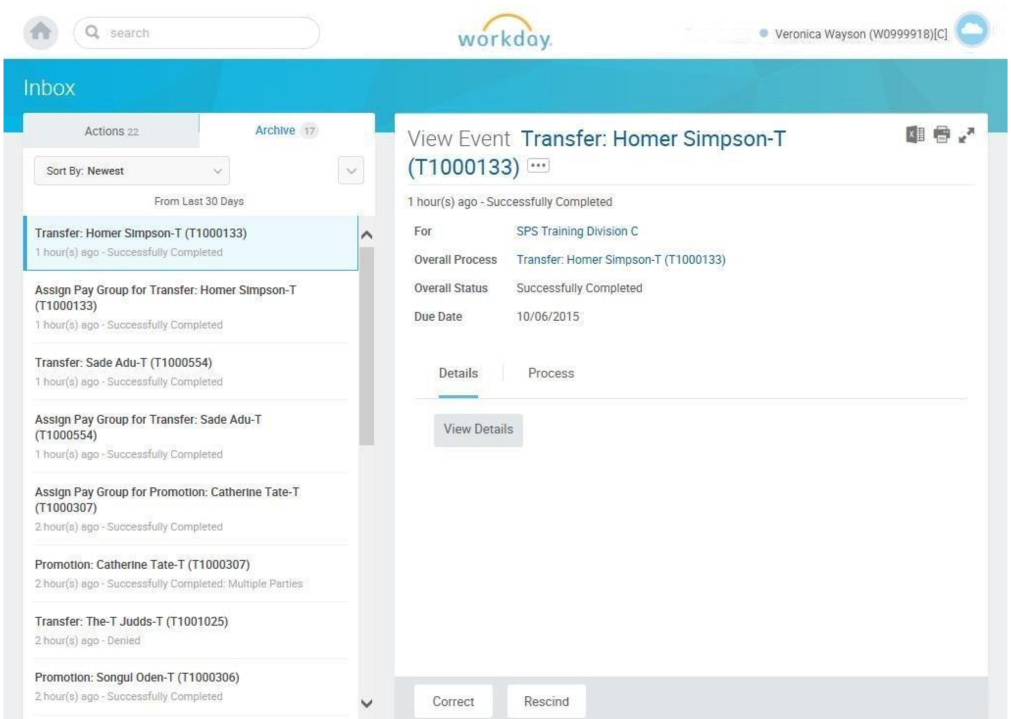
5. Review the transaction details on the Details **Details** tab, if desired.

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:

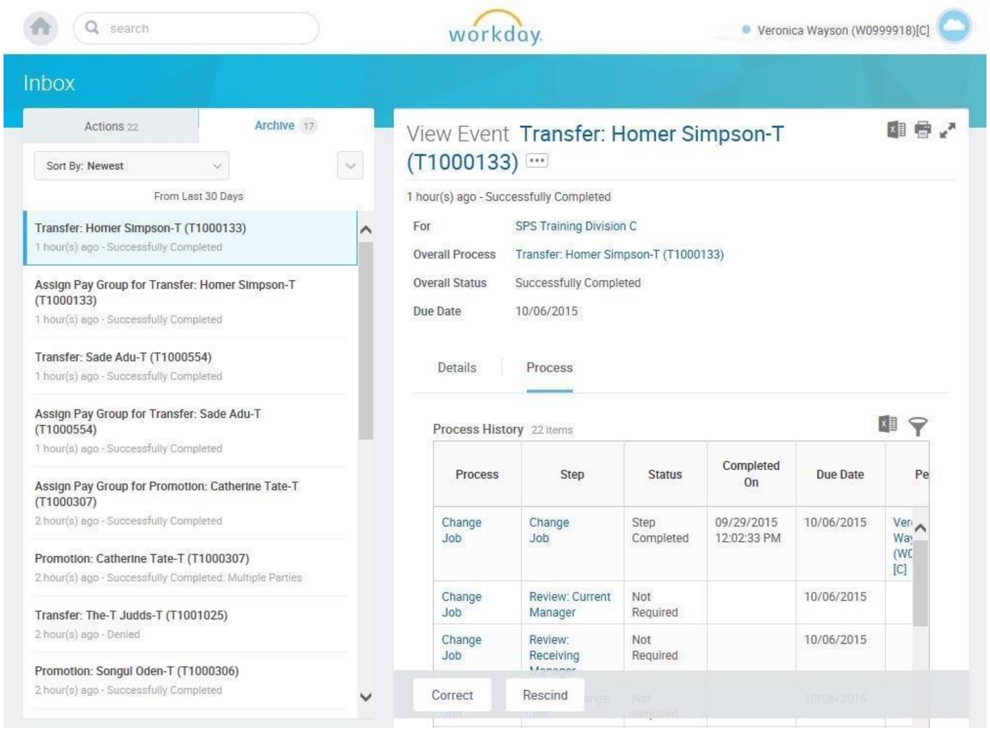
- "Successfully Completed" when required steps in the process have been completed.
- "In Progress" when there are some tasks awaiting action by someone in the business process routing.

Inbox



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

Inbox



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.