# STATEWIDE PERSONNEL
# S Y S T E M

**Change Job - Transfer**

**November 2022**

# 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:**<br>- **Action = Transfer**<br>- **Ensure the W# for the worker has been automatically populated**<br>- **Start Date = the effective date of the transfer**<br>- **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:**<br>- **New manager and supervisory organization**<br>- **Reason (see Events and Reasons section)**<br>- **New position**<br>- **Other job details, as needed** |
| **Review JobAps Data*** | HR Coordinator (Proposed Agency) | **Review job change data from JobAps, including:**<br>- **New manager and supervisory organization**<br>- **Reason (see Events and Reasons section)**<br>- **New position**<br>- **Other job details, as needed** |
| **Proposed Compensation** | HR Coordinator (Proposed Agency) | \*\***If non-conversion reason is used, this step will be triggered\*\*\***<br>- **Need to change salary to hourly or hourly to salary**<br>- **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.** |
| **Role Assignment to Dos*** | (Current Agency) | **Review user-based security assignments, if applicable** |
| **Assign Pay Group*** | **HR Coordinator (Proposed)** | **Assign pay group for the job change.**<br>**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.

**Transfer Event**

| Reason | Description |
|---|---|
| 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 | • End of Temporary Duty<br>• Indep Agency (JobAps)<br>• Intra Agency (JobAps)<br>• Other Agency (JobAps)<br>• Reassignment in Same Agency<br>• 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 | • End of Temporary Duty<br>• Indep Agency (JobAps)<br>• Intra Agency (JobAps)<br>• Other Agency (JobAps)<br>• Reassignment in Same Agency<br>• 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] icon from the Home Screen.

2. Click the Change Job task in your inbox.

3. Click the arrows [icon] to expand the window.
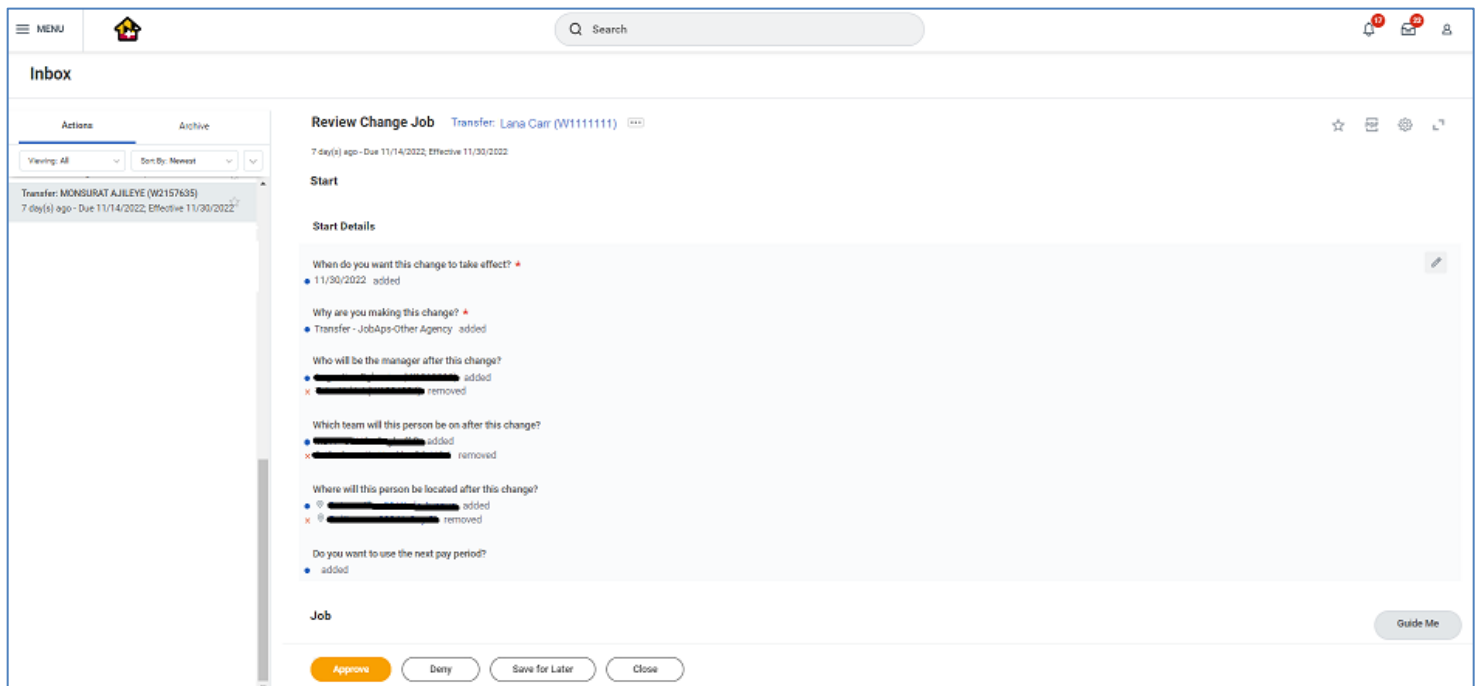
4. Scroll to see full details to review the information.

5. Click the **Approve** [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.*
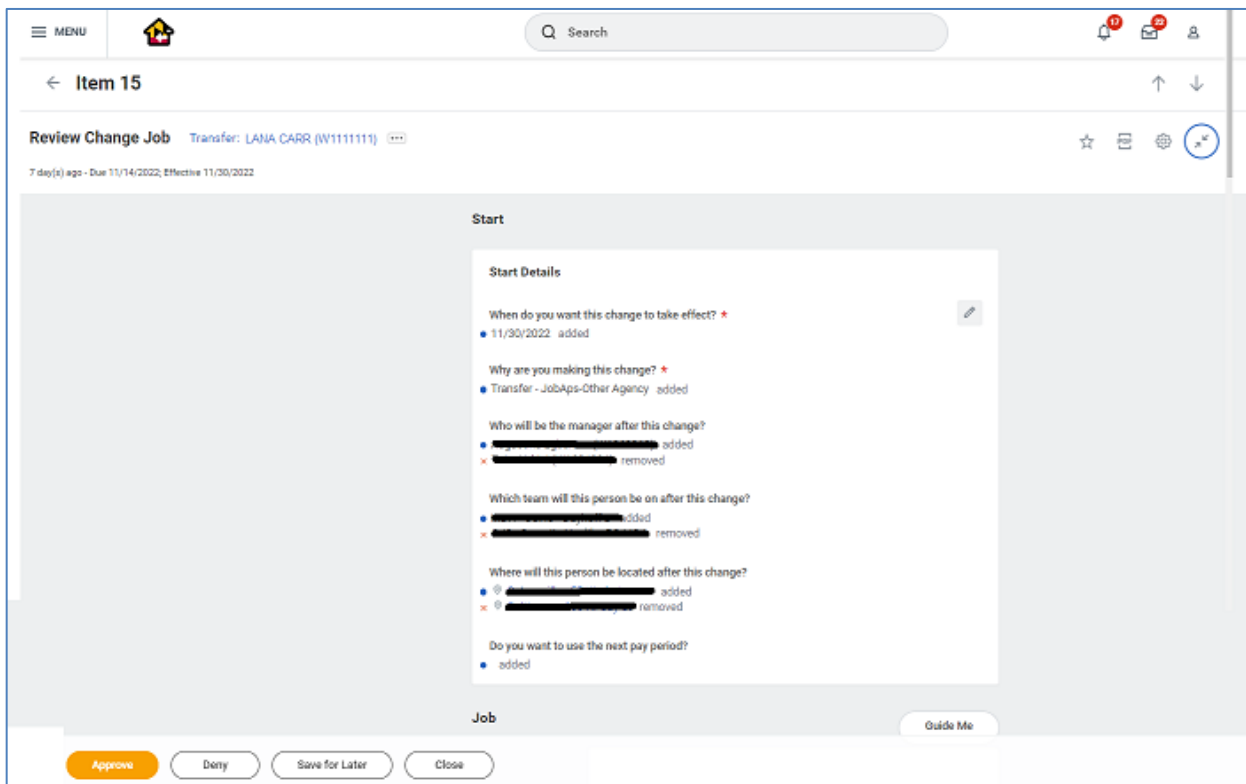


**Information**: Click the View Details to see the remaining steps. You can also view the remaining steps through your Archive Inbox and click on Process.
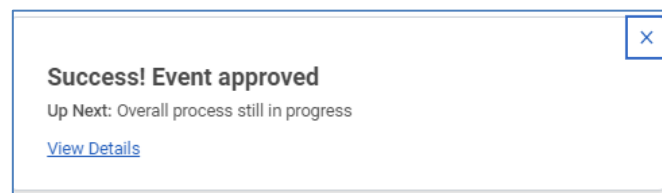


6. The System Task is complete.

# 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.
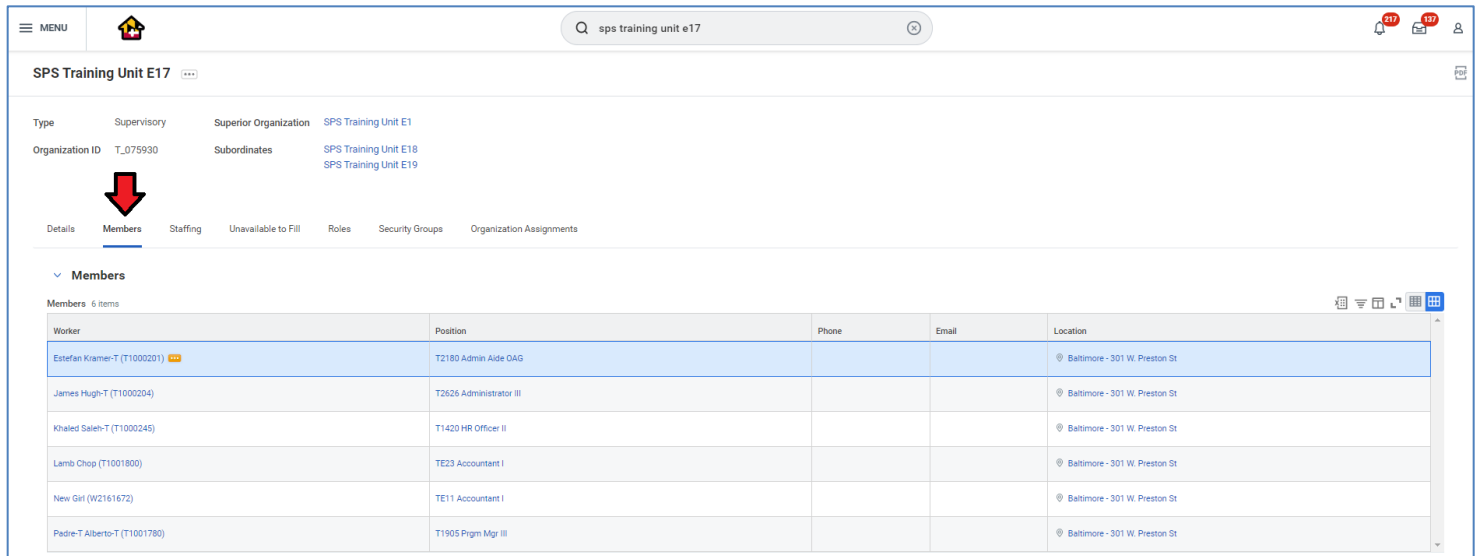
    **Tip:** If you know the employee's name or employee ID for which you are processing a job change, you can search using these values.

2.  Click the **search** icon.

3.  Click the Supervisory Organization hyperlink in the search results. NOTE: You may have to select Organization on the left-hand side of the screen to narrow the search for Organizations only.
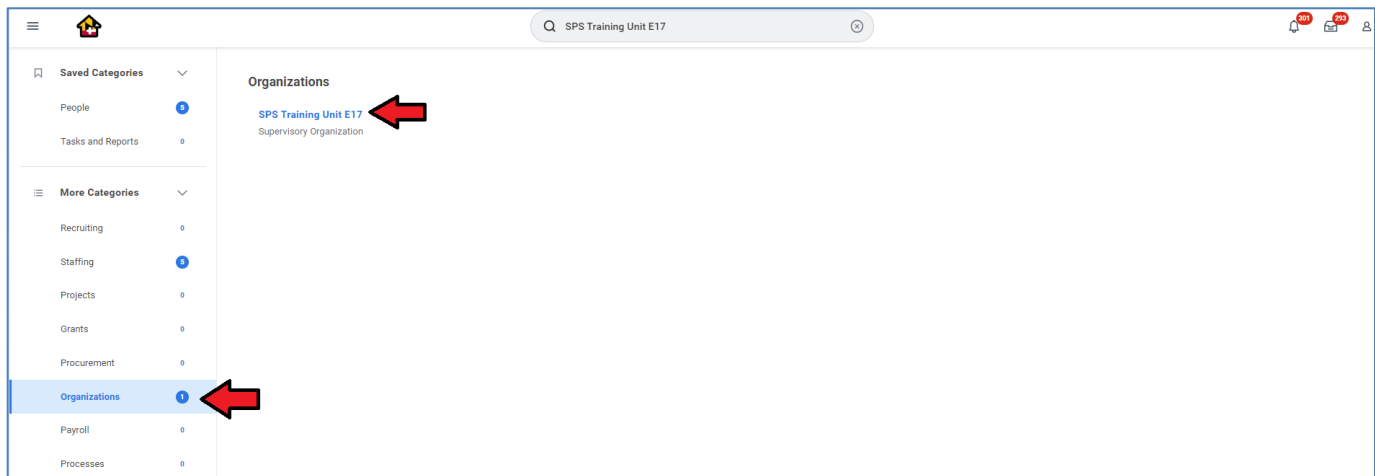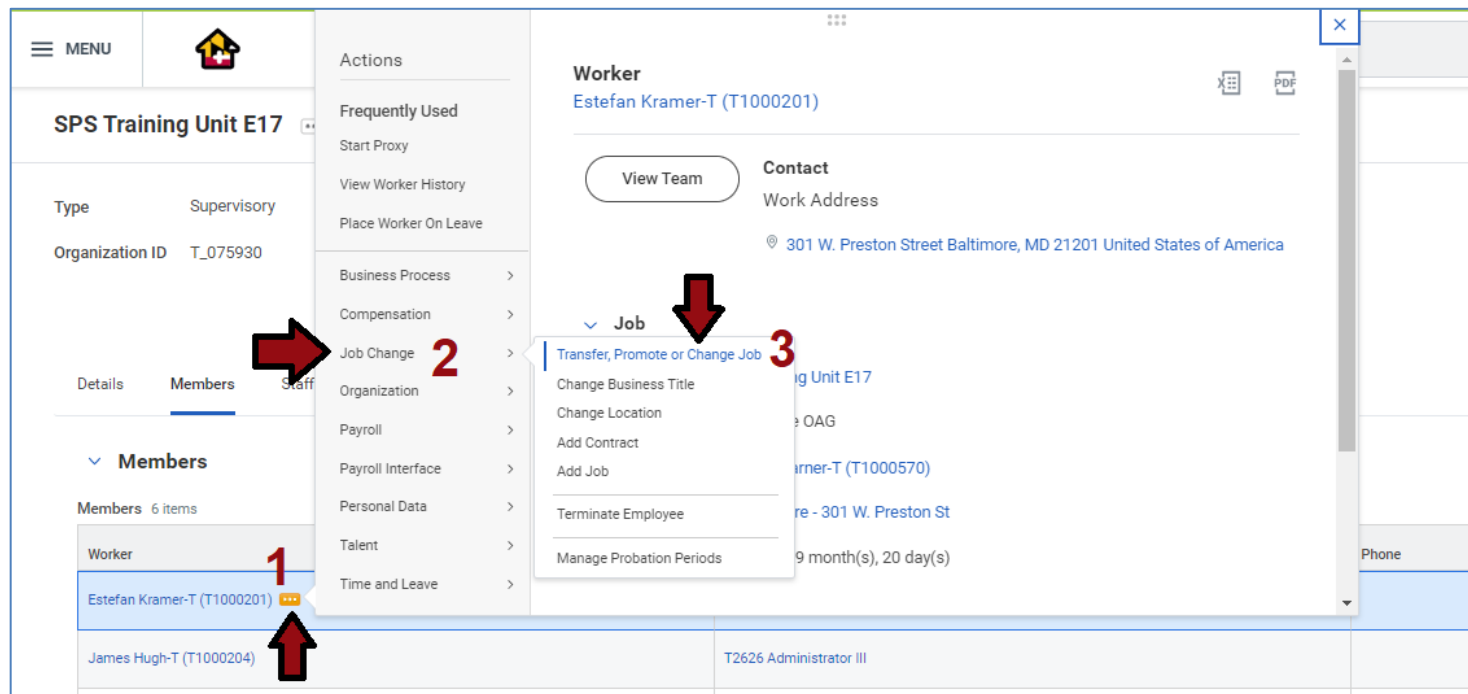
4. Click the **Members** tab.
5. Identify the employee you want, then click the Related Actions and Preview [icon] icon next to the employee's name.

| Worker | Position | Phone | Email | Location |
|---|---|---|---|---|
| Estefan Kramer-T (T1000201) ··· | T2180 Admin Aide OAG | | | ⊙ Baltimore - 301 W. Preston St |
| James Hugh-T (T1000204) | T2626 Administrator III | | | ⊙ Baltimore - 301 W. Preston St |
| Khaled Saleh-T (T1000245) | T1420 HR Officer II | | | ⊙ Baltimore - 301 W. Preston St |
| Lamb Chop (T1001800) | TE23 Accountant I | | | ⊙ Baltimore - 301 W. Preston St |
| New Girl (W2161672) | TE11 Accountant I | | | ⊙ Baltimore - 301 W. Preston St |
| Padre-T Alberto-T (T1001780) | T1905 Prgm Mgr III | | | ⊙ Baltimore - 301 W. Preston St |

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

7. Click the Edit [pencil icon] 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.)
     o Transfer – Contractual Conversion (Converting contractual PIN to a merit PIN)
     o Transfer – (Non-Conversion) – triggers compensation
     o Transfer – End of Temporary Duty
     o Transfer – Indep Agency (to a CPBI agency)
     o Transfer – Intra Agency (to a sup org within the same agency)
     o Transfer – Other Agency (to another SPMS agency)
     o Transfer – Reassignment in Same Agency (reassignment to another position within the same agency)
     o 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)
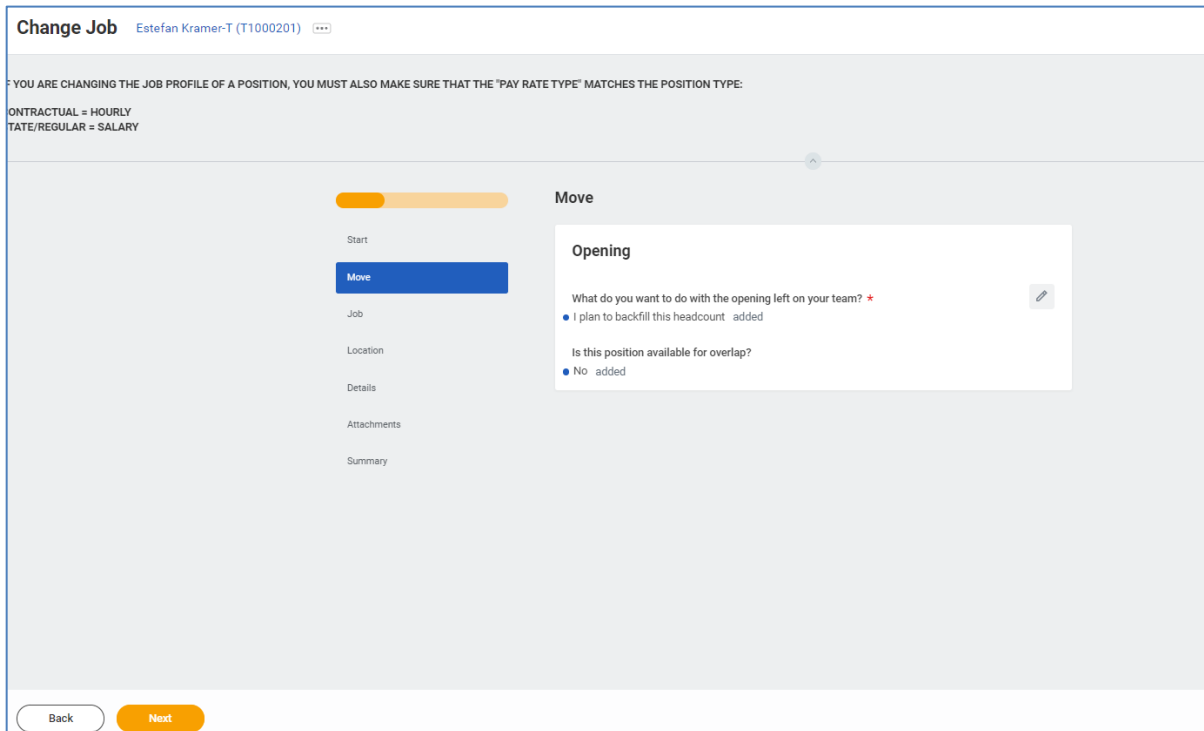


**Information**: The supervisory org defaults from the manager selected. If the manager supervises more than one team, you will need to select the appropriate supervisory org.

8. Click the **Start** [Start button] button.

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

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

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

     •

     ℹ️ **Information**: Leave "I plan to backfill this headcount" selected.

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**Change Job**   Estefan Kramer-T (T1000201)   ⋯

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

**Move**

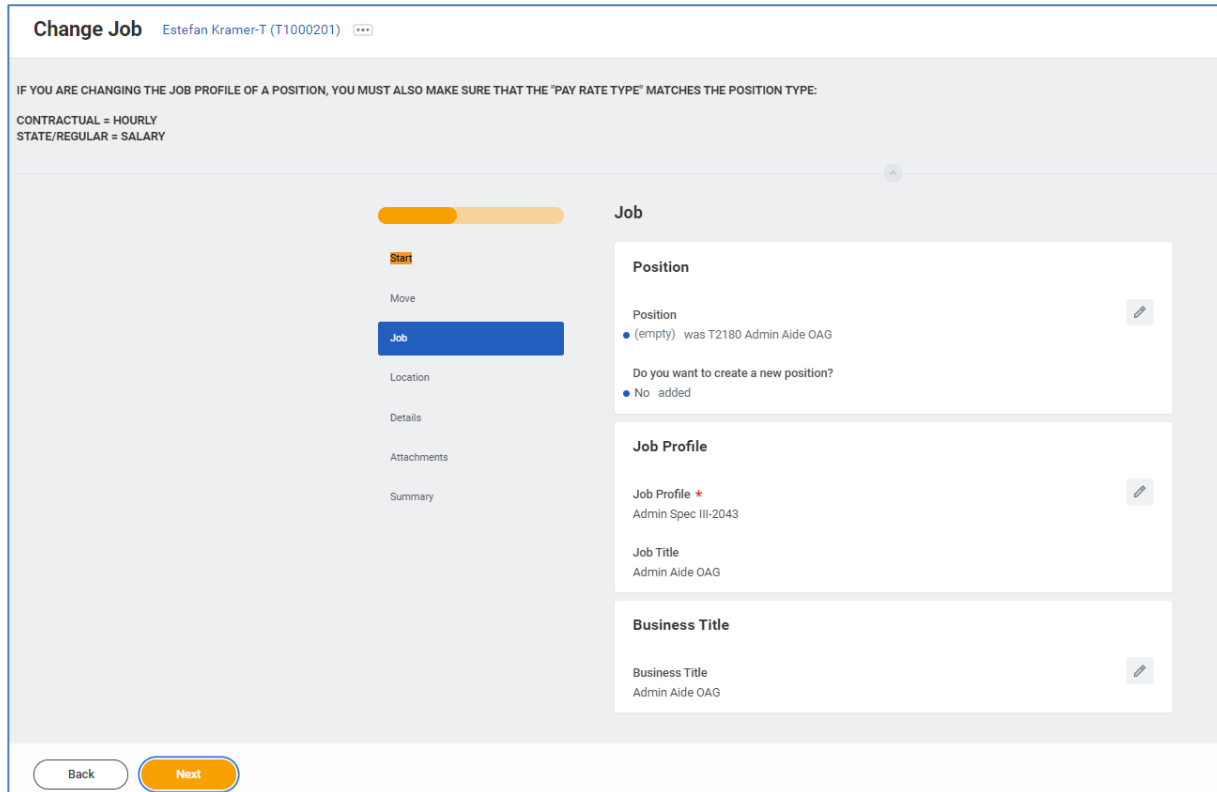| | |
|---|---|
| Start | **Opening** |
| **Move** | What do you want to do with the opening left on your team? *  |
| Job | • I plan to backfill this headcount   added |
| Location | Is this position available for overlap? |
| Details | • No   added |
| Attachments | |
| Summary | |

Back    Next

---

11. Click the Next **Next** button.

12. 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)

**Change Job**   Estefan Kramer-T (T1000201)  ⋯

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

**Job**

Start

Move

**Job**

Location

Details

Attachments

Summary

**Position**

Position
● (empty)  was T2180 Admin Aide OAG

Do you want to create a new position?
● No  added

**Job Profile**
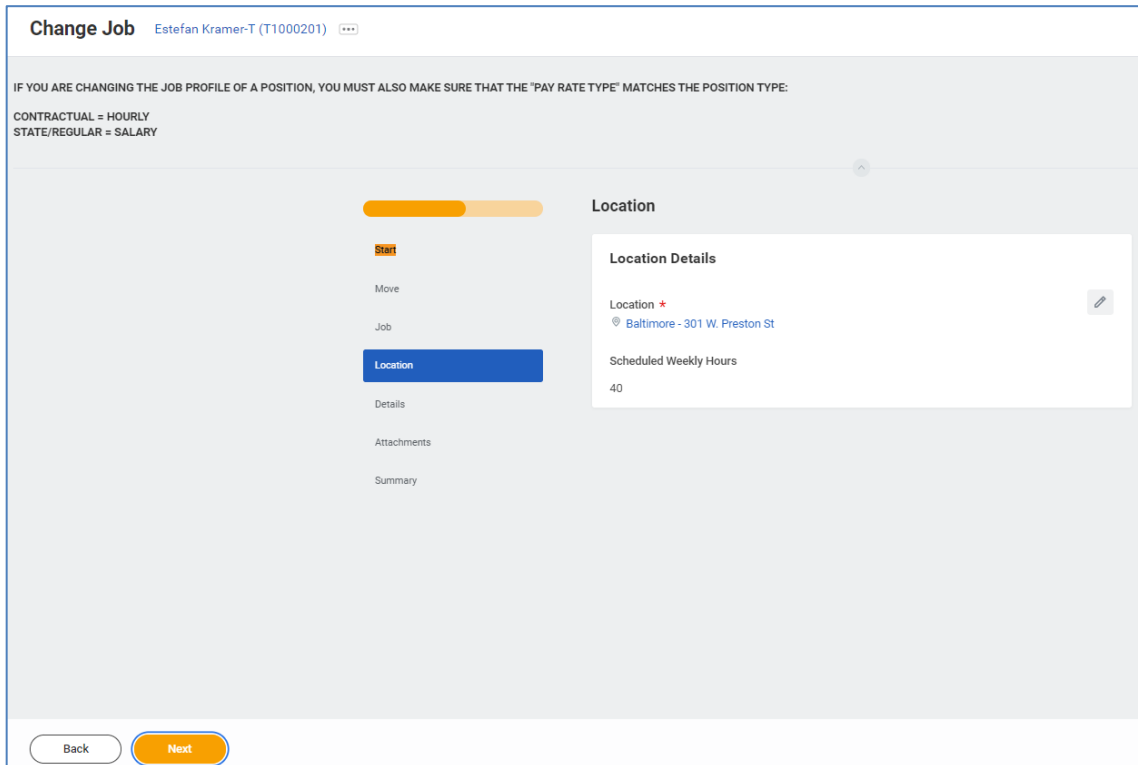
Job Profile *
Admin Spec III-2043

Job Title
Admin Aide OAG

**Business Title**

Business Title
Admin Aide OAG

Back     Next

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

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

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

**Change Job** Estefan Kramer-T (T1000201) ...

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
Move
Job
Location
Details
Attachments
Summary

**Location Details**

Location *
⊙ Baltimore - 301 W. Preston St

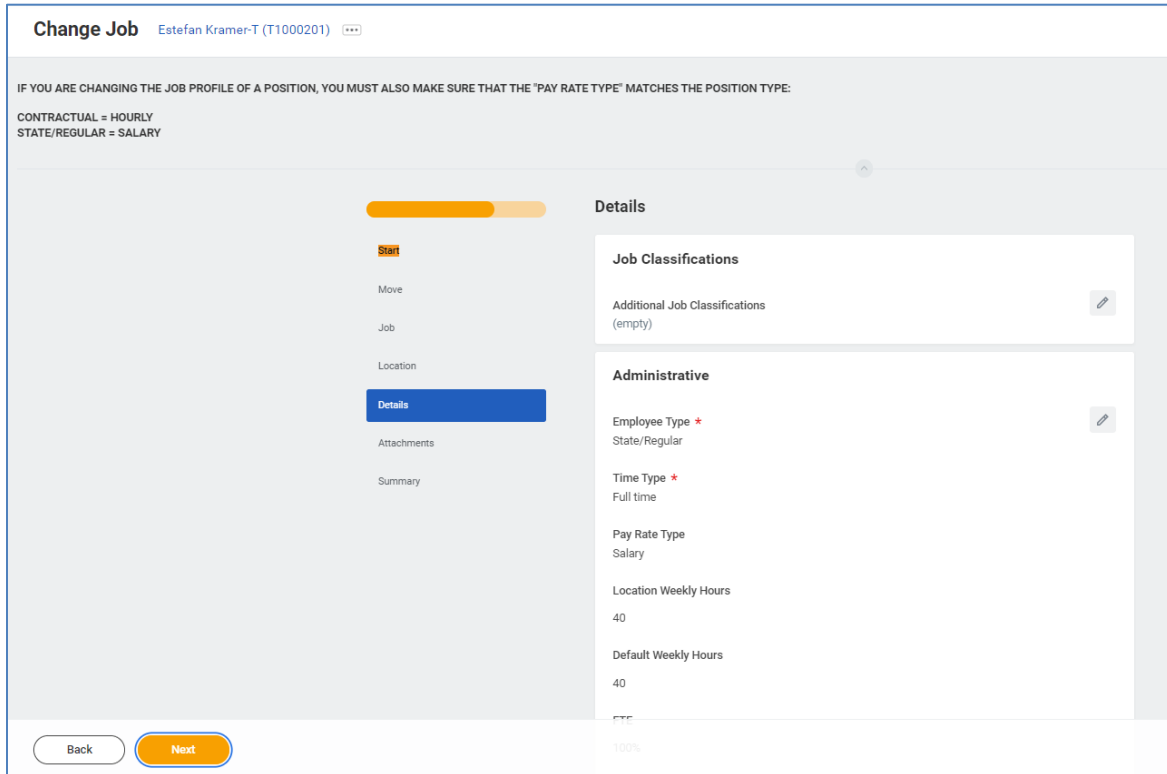Scheduled Weekly Hours

40

Back    Next

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

16. 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.

**Change Job**  Estefan Kramer-T (T1000201)  ⋯

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

**Details**

Start
Move
Job
Location
**Details**
Attachments
Summary

**Job Classifications**

Additional Job Classifications
(empty)

**Administrative**

Employee Type *
State/Regular

Time Type *
Full time

Pay Rate Type
Salary

Location Weekly Hours
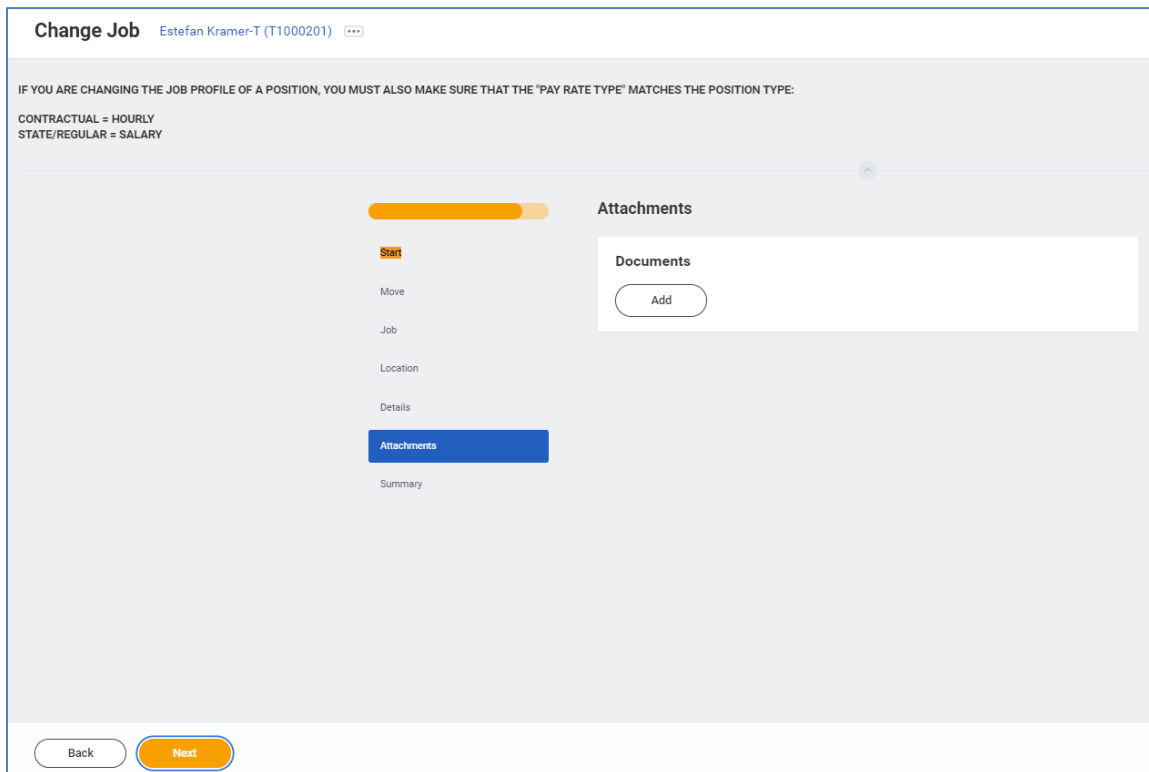40

Default Weekly Hours
40

FTE
100%

Back    Next

17. Click the **Next**   **Next**   button.

18. 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.

**Change Job**  Estefan Kramer-T (T1000201)  ···

IF YOU ARE CHANGING THE JOB PROFILE OF A POSITION, YOU MUST ALSO MAKE SURE THAT THE "PAY RATE TYPE" MATCHES THE POSITION TYPE:
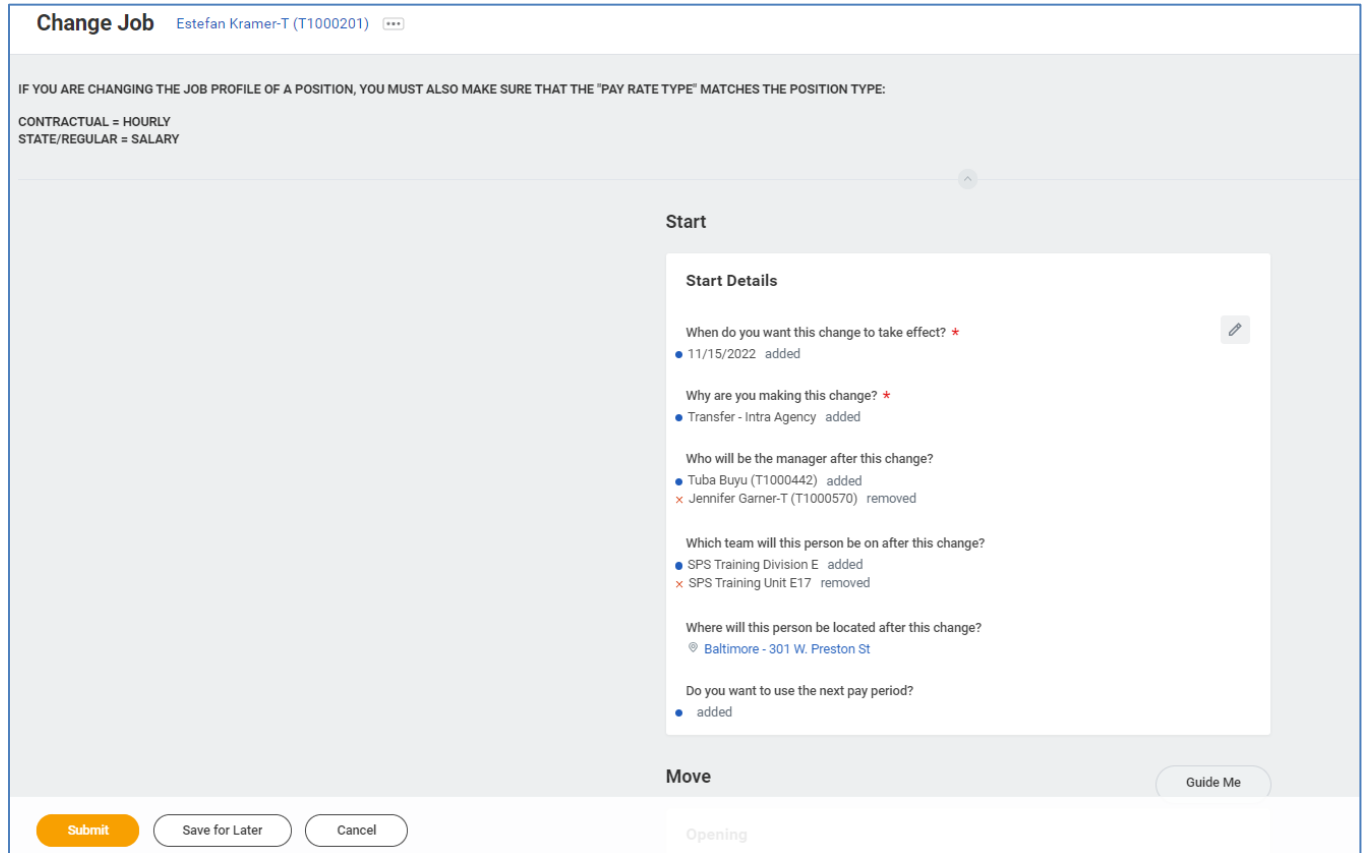
CONTRACTUAL = HOURLY
STATE/REGULAR = SALARY

Start
Move
Job
Location
Details
**Attachments**
Summary

**Attachments**

**Documents**

Add

Back    Next

19. Click the **Next** button.

20. Review your entries on the Summary page. When you are done, click the **Submit** button.

**Change Job**  Estefan Kramer-T (T1000201)  ...

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**

**Start Details**

When do you want this change to take effect? *
● 11/15/2022  added

Why are you making this change? *
● Transfer - Intra Agency  added

Who will be the manager after this change?
● Tuba Buyu (T1000442)  added
✕ Jennifer Garner-T (T1000570)  removed

Which team will this person be on after this change?
● SPS Training Division E  added
✕ SPS Training Unit E17  removed

Where will this person be located after this change?
◉ Baltimore - 301 W. Preston St

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

**Move**                                                    Guide Me

Opening

Submit    Save for Later    Cancel

21. The next step in the process is to complete the Appointment Certification Form, if required. Click the *Complete Questionnaire* button to start the next task in the business process.

**Success! Event approved**

Up Next:          ˈ| Complete Appointment Certification
Form

View Details

**Complete Questionnaire**
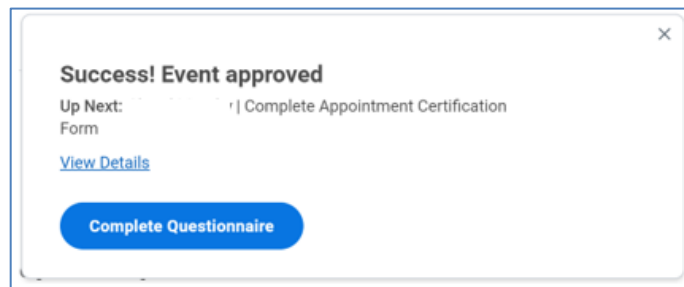
22. The System Task is complete.
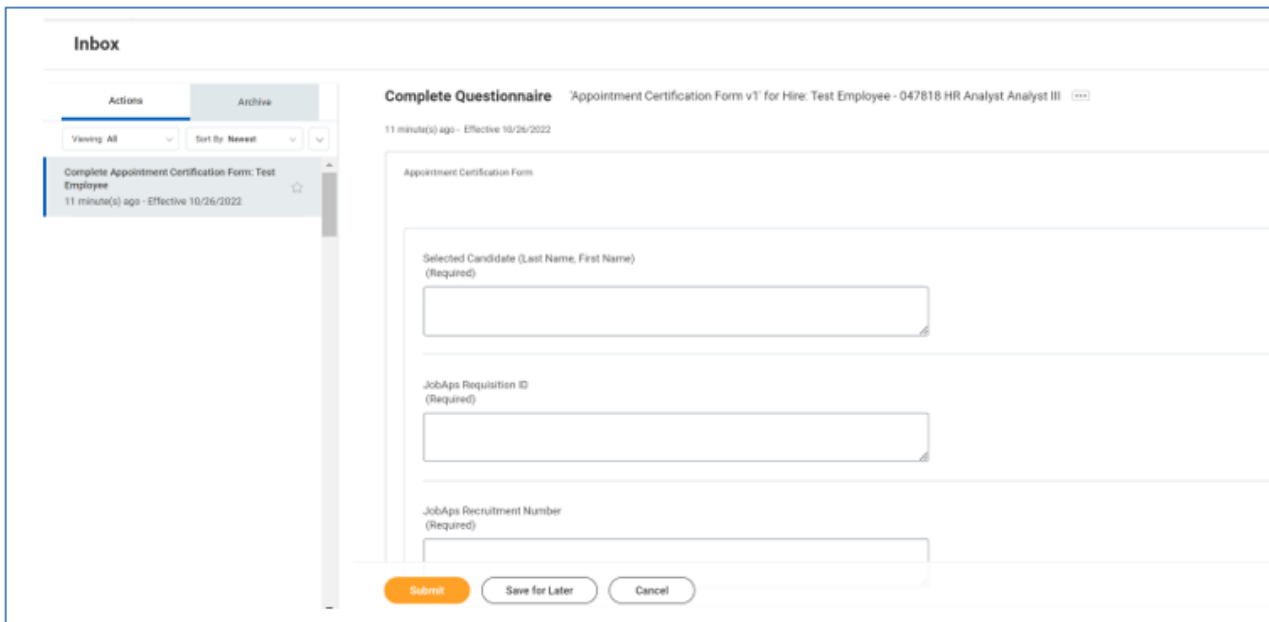
# Appointment Certification Form

The next step in the business process is to complete the Appointment Certification Form for the transfer, as required.

If the recruitment for this position requires the completion of an Appointment Certification Form, this task will be required in the Transfer Business process.
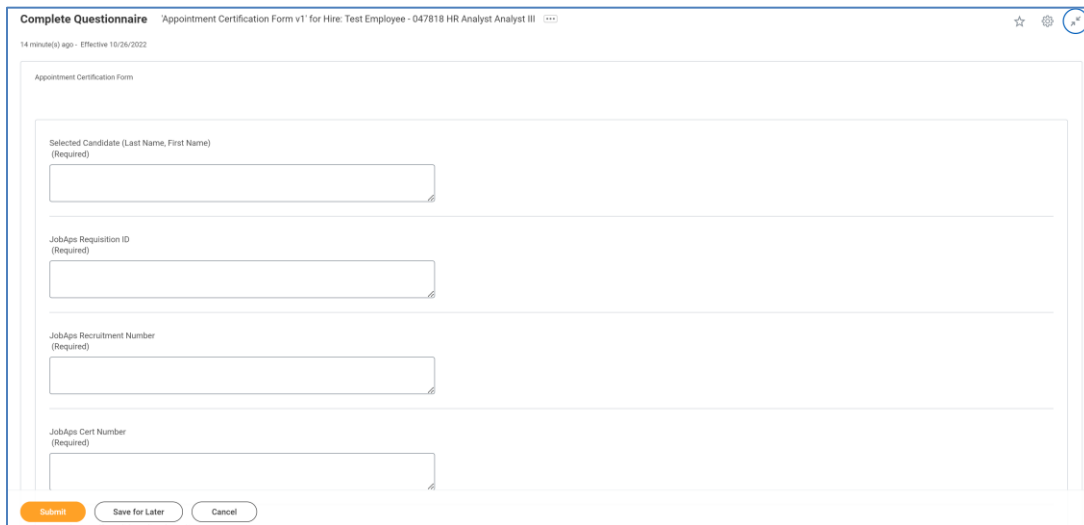
Access this task from your Inbox. Look for the "Complete Appointment Certification Form" task in your Inbox that includes the employee's name.

## Procedure:

1. Click the **Inbox** ⊟ icon.

2. Locate and select the *Complete Appointment Certification Form* followed by the name of the employee.

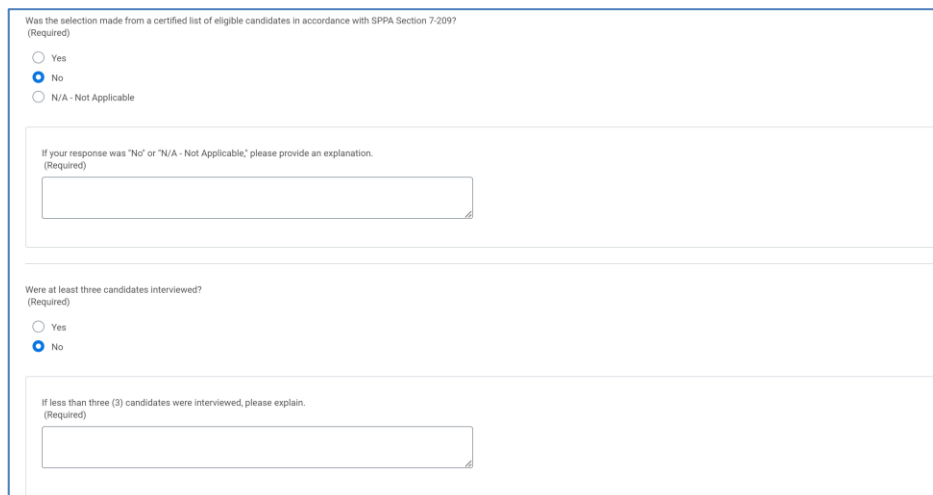3. Click on the arrow ⌐ icon to expand the screen.

4. All fields on this questionnaire are required, fill in the text prompts for the following information:

- *Selected Candidate (Last Name, First Name)*

- *JobAps Requisition ID*

- *JobAps Recruitment Number*

- *JobAps Cert Number*



5. If you select "No" or "N/A" for the following questions, you will be required to give an explanation:

- *Was the selection made from a certified list of eligible candidates in accordance with SPPA Section 7-209?*

- *Were at least three candidates interviewed?*

Was the selected person an open or promotional candidate?
(Required)

- ● Open
- ○ Promotional
- ○ Was employed by a State Agency, but is not a promotional candidate.

Method Used to Fill the Vacancy
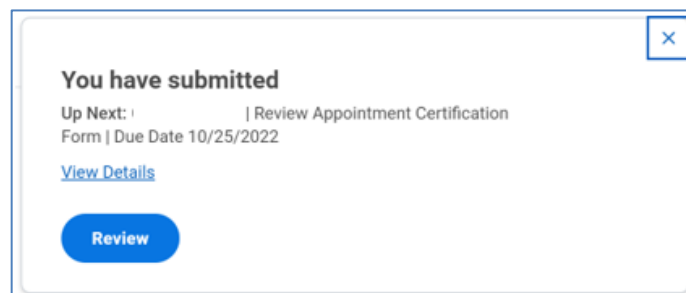(Required)

[ Other reinstatement candidate select... ▼ ]

Indicate the type of project completed.
(Required)

- ○ A requisition and recruitment planner were completed and approved by DBM RED to conduct a recruitment to establish a new list.
- ○ Completion of a PSP Lite requisition for: filling a vacancy using an existing list; recruiting for/hiring at an at-will position; hiring a transfer, reinstatement, voluntary demotion, Interview and Hire.
- ● Completion of a PSP Lite requisition for a Streamlined Selection recruitment.

> If Streamlined Selection was used, select all functions the the agency performed. (Items A, B, C, D, and E must have been performed.)
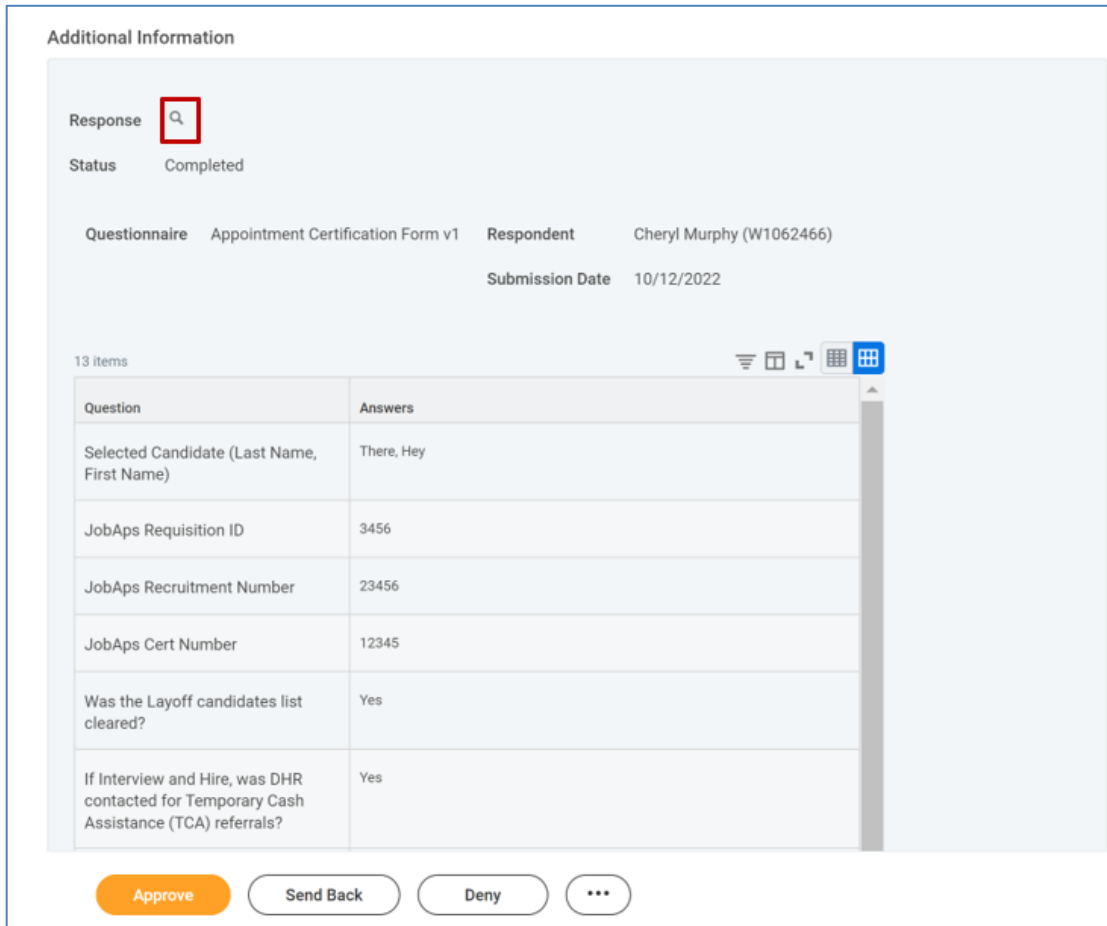> (Required)
>
> [ ☰ ]

Select all applicable statements that your agency performed.
(Required)

[ ☰ ]

[ Submit ]  [ Save for Later ]  [ Cancel ]

6.  Follow the prompts to complete the entire form. Then click the Submit [ Submit ] button.

> **You have submitted**
> Up Next: |        | Review Appointment Certification
> Form | Due Date 10/25/2022
>
> View Details
>
> [ Review ]

7.  Use the pop up to Review the Appointment Certification and click [ Review ] button.

8. The hire and job details for the hire will be shown at the top of the screen and the ACF details will be shown at the bottom of the screen, to be reviewed.



9. To print the form, navigate to Additional Information section, and click on the [Q] icon next to *Response*.

10. On the *View Questionnaire Response* page, you may select the Print as a PDF [PDF] button to view the completed ACF Questionnaire and print as needed.

11. Once reviewed and/or printed, you should navigate back to the "Review the Appointment Certification" task in your inbox for this hire, then proceed click the Approve [Approve] button.

12. The System Task is complete.

# 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.
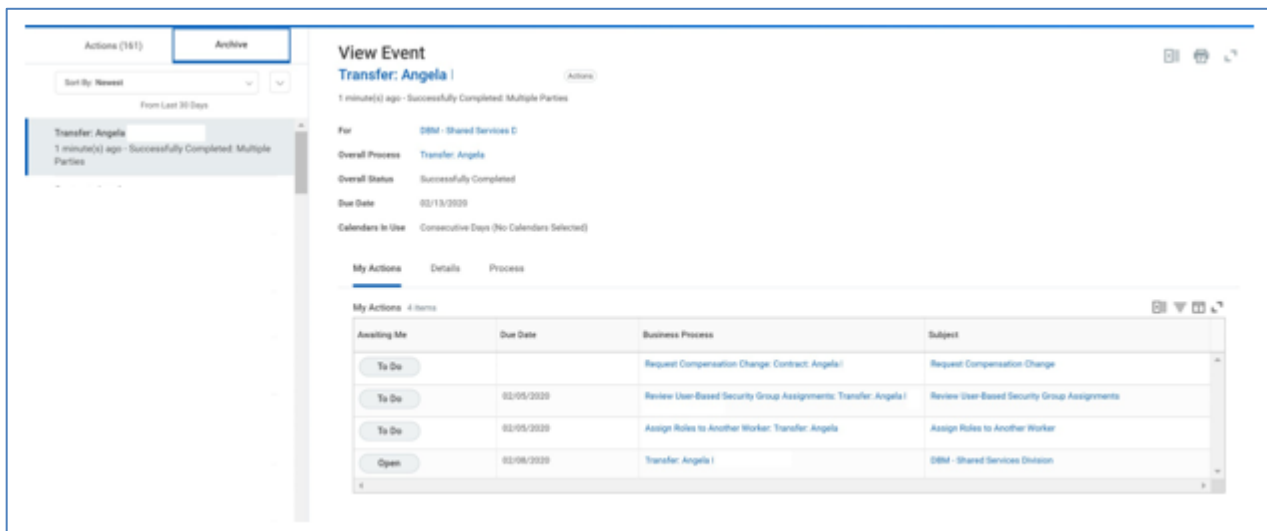
2.  Go into each To Do item and complete the task advised if necessary.

**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 [ |
| 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. |

enter your cor

Submit        Save for Later        Close

3.  Click the **Submit**        **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.

**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.

4.  The System Task is complete.