Transfers: Internal Transfers for Recruiters and Managers

Step 1 - Create a Job Requisition and Position

From Search:

1. Access the **Create Job Requisition** task.

2. (Optional) Copy details from an existing job requisition; click the **prompt** icon ☰ to select a job requisition.

3. Click the **prompt** icon to select the Supervisory Organization (Manager or Location) for this job requisition.

4. Select **Create New Position**

5. Click the **arrow** to select the Worker Type and click **OK**.

6. From here, you are guided through a series of screens to complete the information required by your organization. The fields with an asterisk are required.

7. From the Recruiting Information page, click the **Edit** icon ✎ to access and complete the required Recruiting Details. Select **Internal Transfer** for the Reason. Ensure the Recruiting Start Date is back dated, if necessary, to accommodate the actual transfer date. When you have completed all the required information, click **Next** to continue.

8. From the Job page, click the **Edit** icon to access and complete the required Job Details described below. If you copied information from another position, you can make edits on this screen. When you are done, click **Next** to continue.

9. From the Attachments page, click the **Add** button to add any supporting documentation to the job requisition. These documents are not viewable by the applicant. Click the **Next** button to continue.

10. From the Assign Roles page, click the **Add** button to add the Primary Recruiter. Click the **Next** button to continue.

11. From the Summary page, you will see all of the information entered from the previous screens. Click the **Edit** icon to make additional changes, or click **Guide Me** to return to the Guided Editor.

12. In the Comment Section, enter the expected salary or salary range for the position

13. Click **Submit** or **Save for Later**.

14. Click **Open** and add required Organization Assignments

15. Click **Done.** The requisition will route for approval.

16. Provide the approved job requisition number to both the transferring and receiving manager

> Note: The job requisition does not have to be posted for an Internal Transfer. The position will automatically be marked as filled when process is complete

Step 2 - Transfer the Employee (Transferring Manager)

Click on the **My Team** worklet

1. Click on Transfer, Promote, or Change Job.

2. Click the **prompt** icon ☰ to select the worker being transferred and click **OK**.

3. From the Start page, click the **Edit** icon ✎ to access and complete the required Start Details. This includes why we are making the change, and adding the new manager and/or new location. Click the **START** button.

4. From the Move page, click the **Edit** icon to access and complete the new opening details

   a. Backfill the headcount (headcount is still available)

   b. Move the headcount to new manager (headcount no longer available at this location)

   c. Close this headcount (headcount no longer available at this location)

   d. Position available for overlap

5. Click **Submit**

6. Transfer will route to the Receiving Manager

Step 3 - Transfer the Employee (Receiving Manager)

Click on the **Inbox** worklet

1. Click on the Transfer To Do

2. From the Start section, click the **Edit** icon to access and edit the Start Details if needed.

3. From the Job section, click the **Edit** icon to access and add the new job details. Click the **prompt** icon to select the available positions:

> **Note**: Because of the Workday Staffing Management model, a position must be available to transfer or promote an employee

Job

Position

Position
Dispatcher

✕ Dispatcher

Job Requisition
R-00476 Dispatcher (Open)

4. Ensure Job Profile section populates correctly based on new position

5. Edit Location section if needed

6. Review Details section and edit as needed

7. Review Organizations section and if applicable, add new location:

   a. Cost Center

   b. Pay Policy

   c. Punch Policy

   d. Holiday Group

8. Review Compensation section and if applicable, edit:

   a. Salary, Hourly, or Unit

9. Click **Approve**

10. Transfer will route for remaining approvals