Transfers: Internal Transfers for Recruiters and Managers

Internal Transfers

Step 1 - Create a Job Requisition and Position (Recruiters)

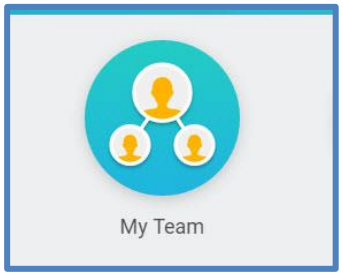
From Search:

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 (Current Manager)

Click on the **My Team** worklet



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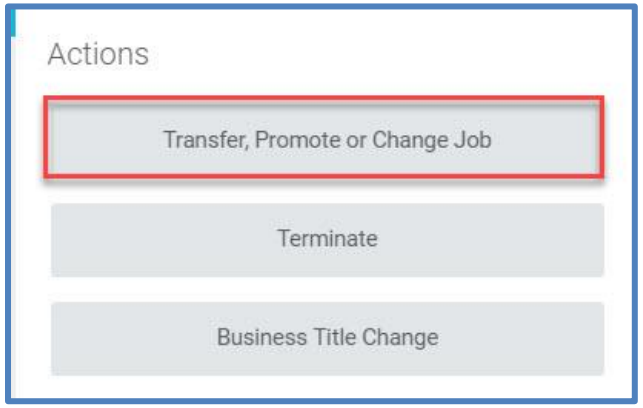
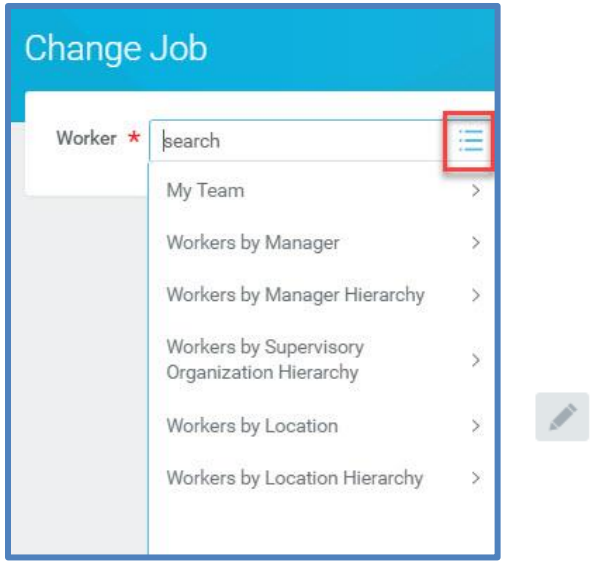
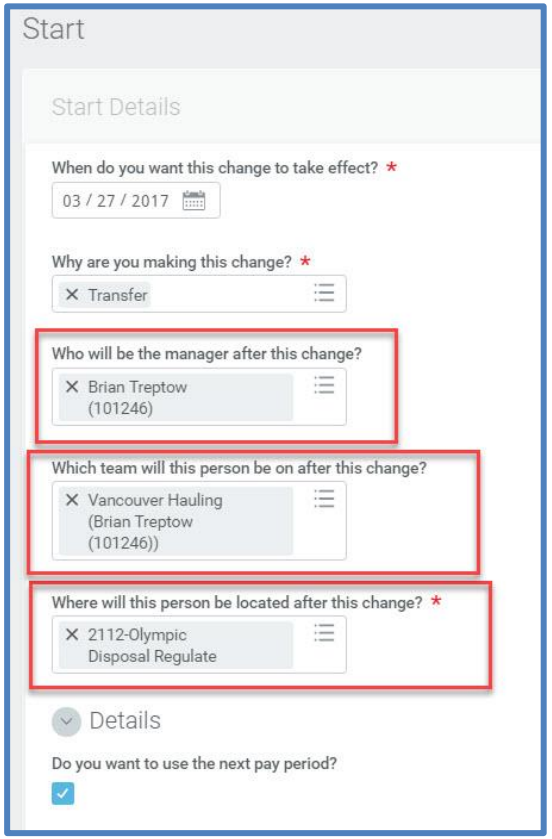
1. Click on **Transfer, Promote, or Change Job**.



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



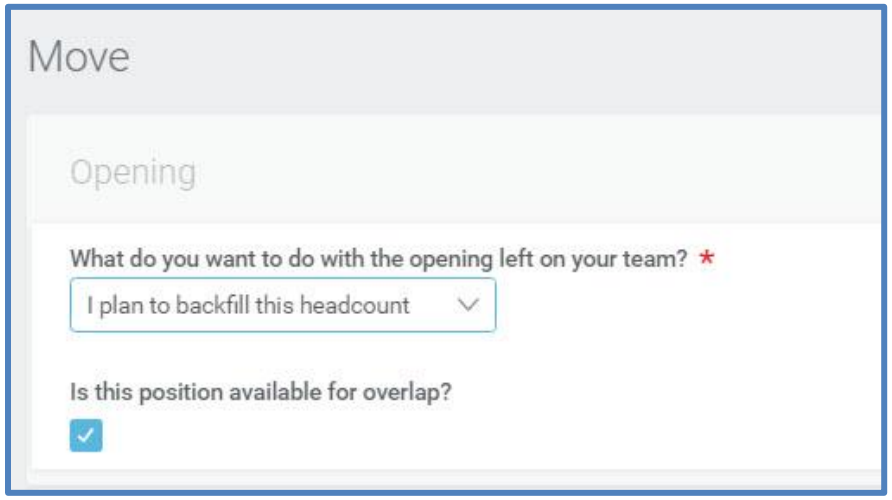
3. From the Start page, click the **Edit** icon to access and complete the required Start Details. This includes why we are making the change, and adding the new manager and/or new location. Click the **START** button.



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)

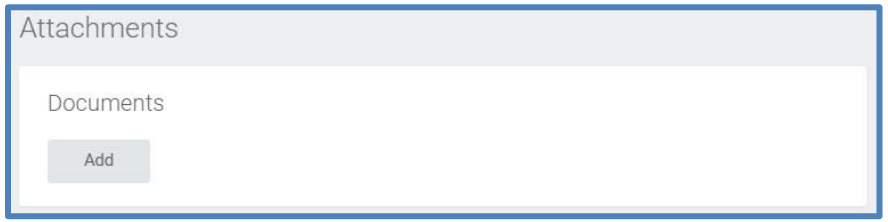
c. Close this headcount (headcount no longer available at this location)

d. Position available for overlap

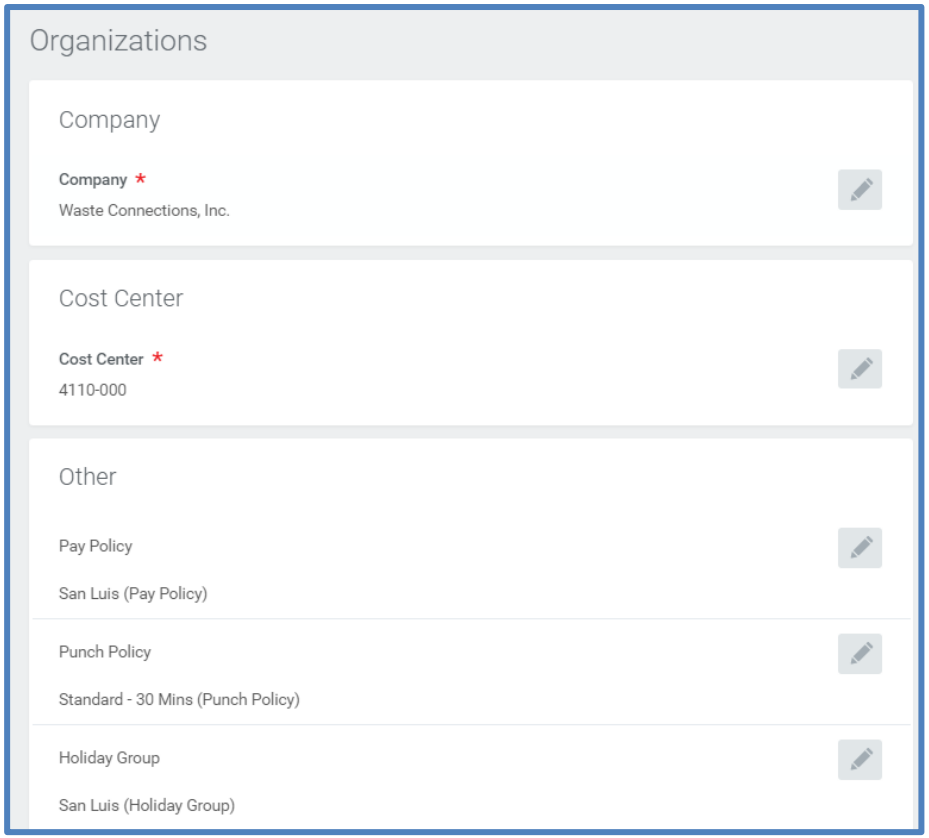


5. Click **Submit**

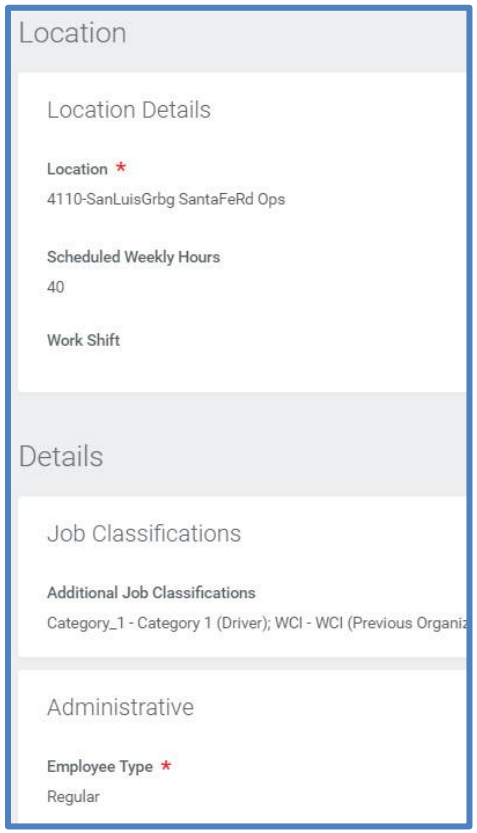
6. The Attachments page displays. Attach any documents and click **Next.**



7. The Organization Page displays. Click the **Edit** icon to access and complete any of the organization assignments. Click **Next.**



9. From the Summary page, Click the **Edit** icon to access and edit any of the details initially entered in the previous pages. Once done, click **Submit** to send to receiving manager**.**



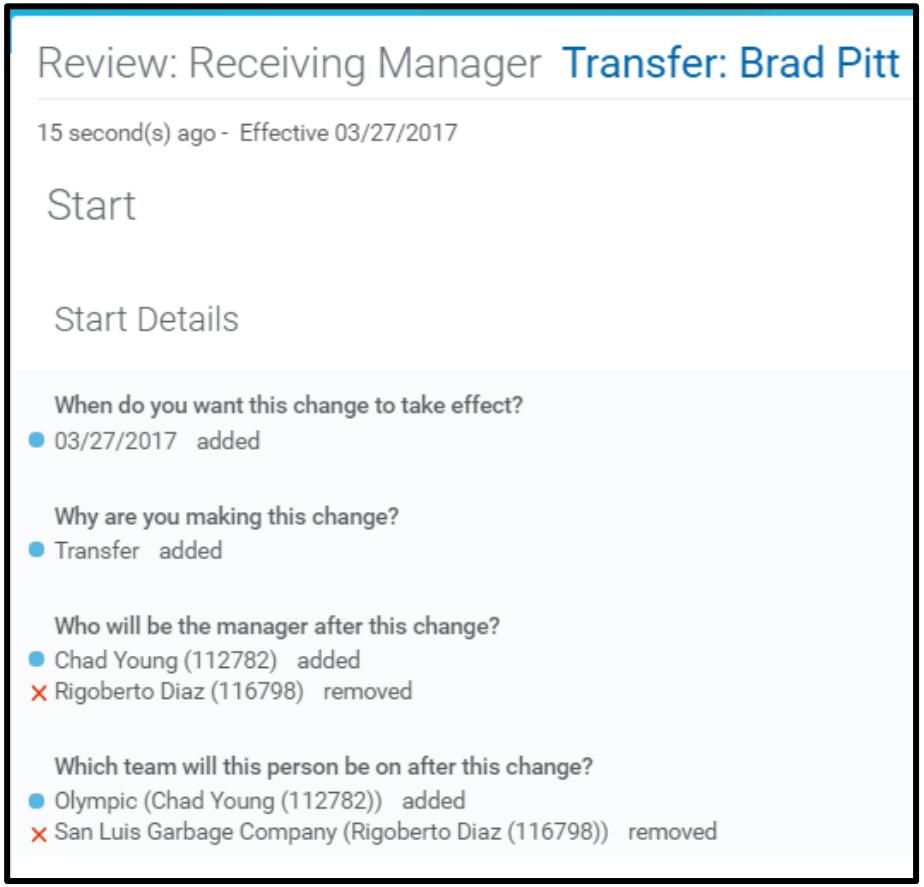
10. Transfer will route to the Receiving Manager

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.



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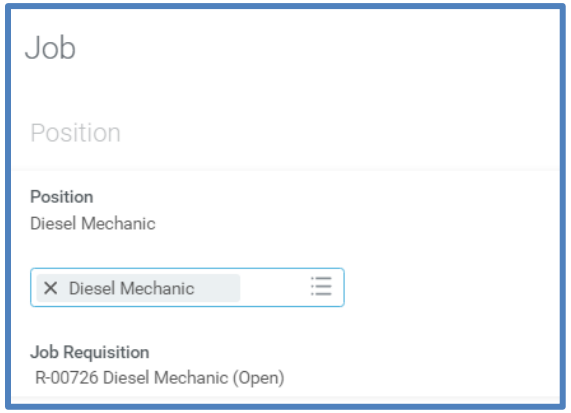
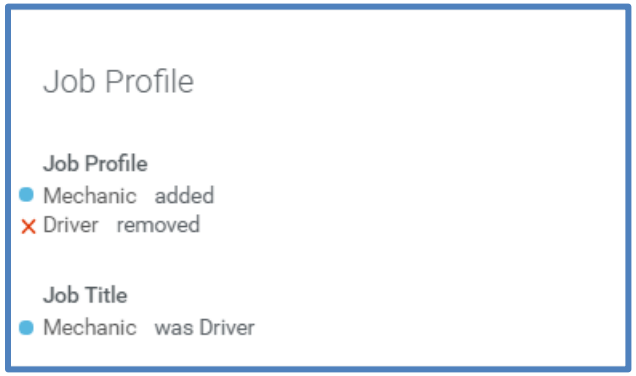
3. From the Job section, click the **Edit** icon to access and add the new job details. Click the **prompt** icon to select the available positions:

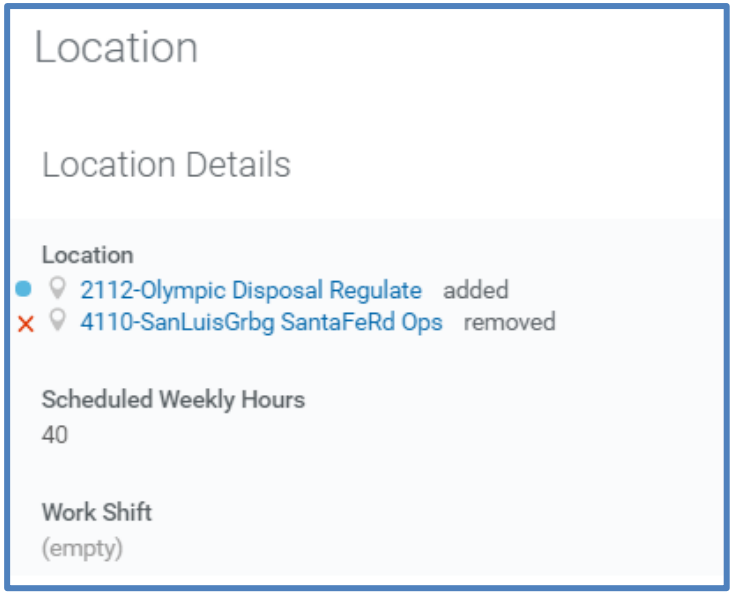


Note: Because of the Workday Staffing Management model, a position must be available to transfer or promote an employee

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

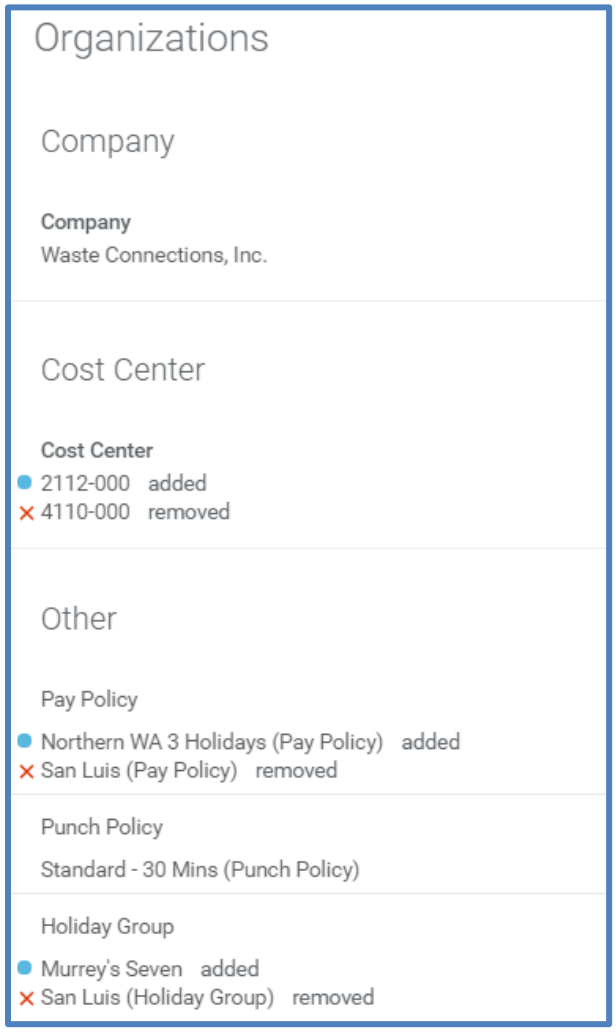


5. Edit Location section if needed

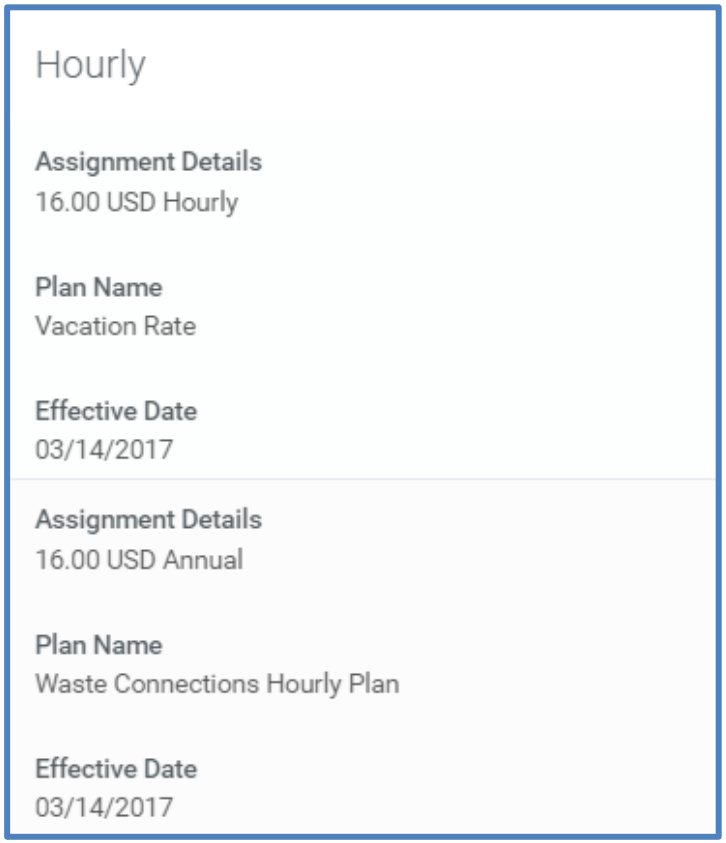


6. Review Details section and edit as needed

7. Review Organizations section and if applicable, add new organization assignments



8. Review Compensation section and if applicable, edit:
   a. Salary, Hourly, or Unit



9. Click **Approve**
10. Transfer will route for remaining approvals

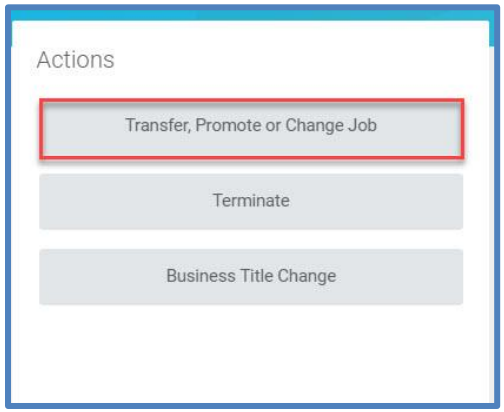
Transfers: Internal Transfers for Recruiters and Managers

Lateral Transfers

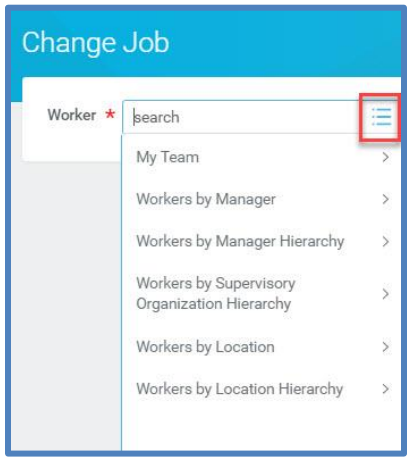
A lateral transfer occurs when an employee is placed in a different position within the same supervisory organization and the manager, location, and compensation remains the same.

From the My Team Worklet:

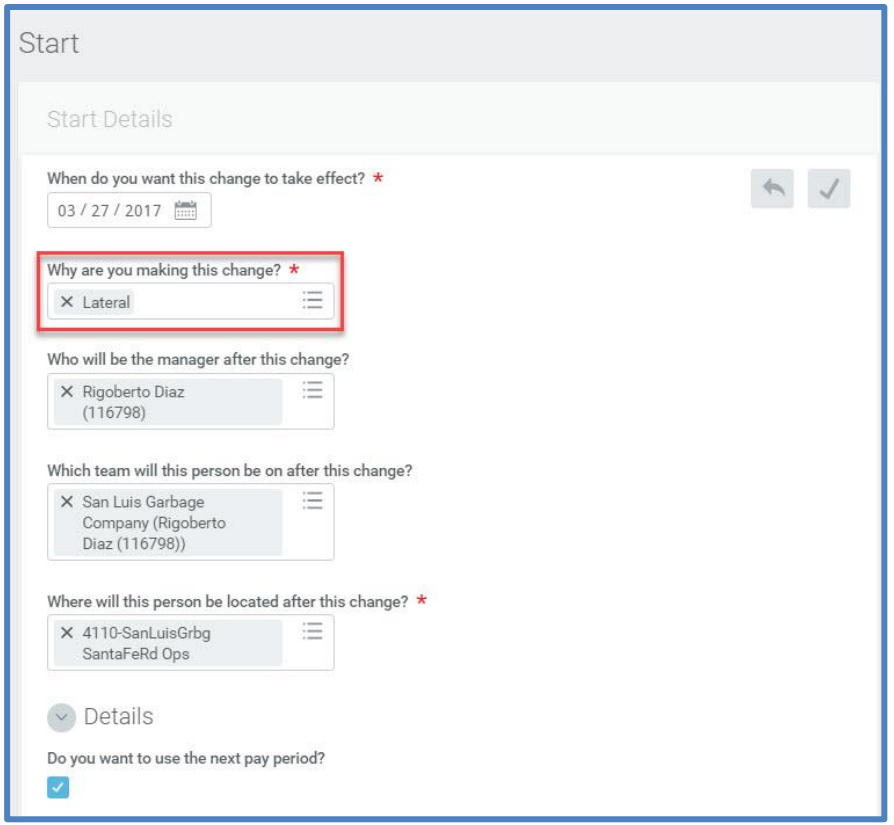
1. Click Transfer, Promote, or Change Job



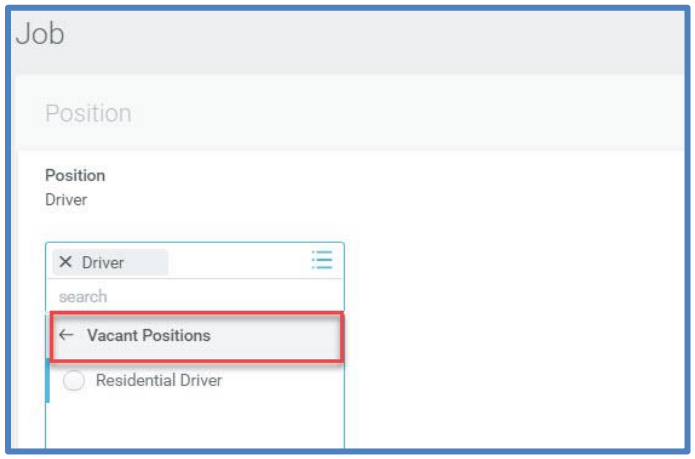
2. Click the **prompt** icon to select the worker being transferred and click **OK**.



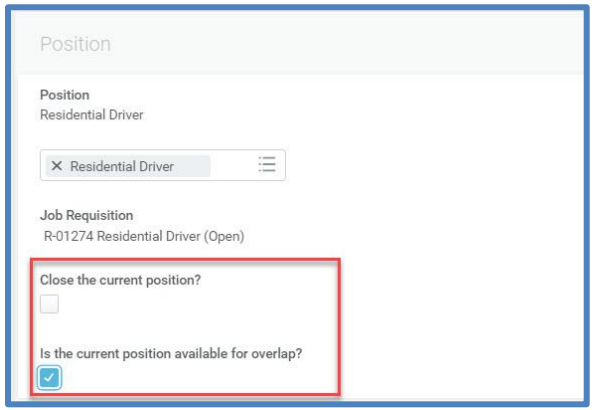
3. From the Start page, click the **Edit** icon to access and complete the required Start Details fields. Select "Lateral" in the "Why are you making the change?" field. Once done, click the **START** button to move through the guided editor.



4. From the Job page, click the **Edit** icon to access and complete the required Job Details fields. From the "Job" field, select "Vacant Positions" and select the position into which the employee will be transferred.

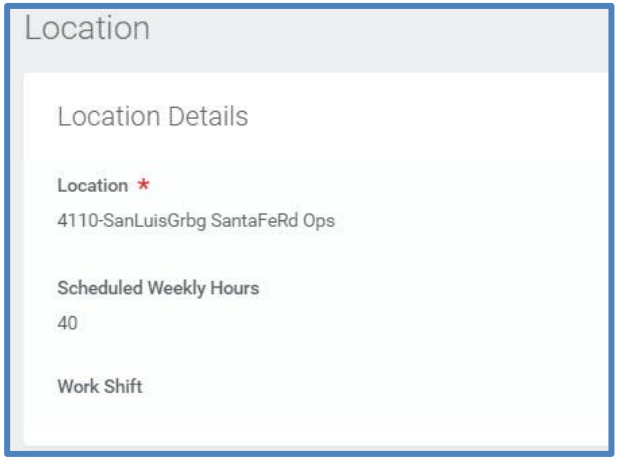


5. Do not check the box to close the current position if it will be replaced with a new worker. However, be sure to always check the box, "Is the current position available for overlap?" Doing so will kick off the recruiting process to hire a new employee for that position.

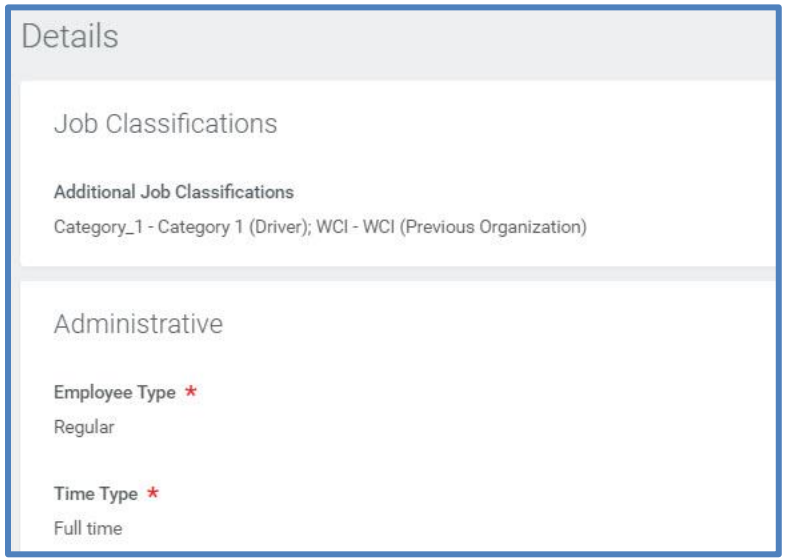


Enter the job profile and business title. Click **Next.**

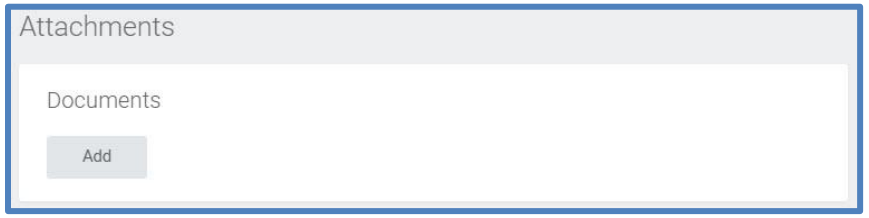
6. The Location page displays. Because this is a lateral transfer, the location details won't change so no edits are required on this page. Click **Next.**



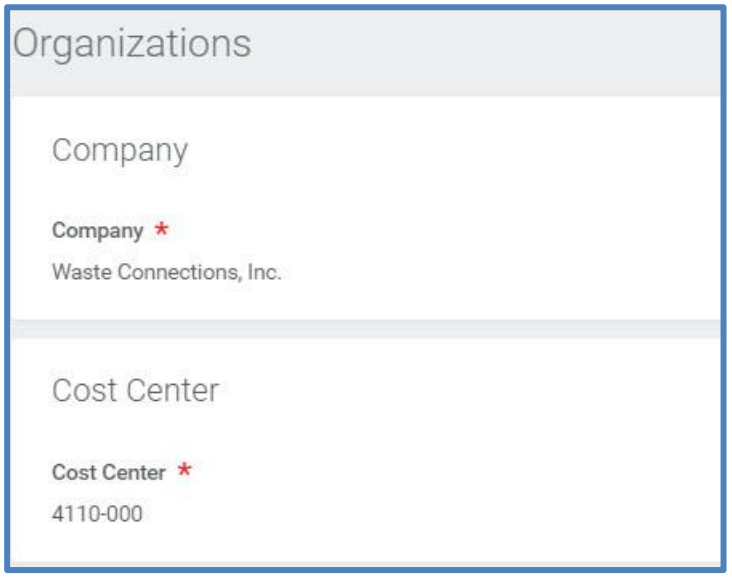
7. The Details page displays. Unless there are any job classification and/or administrative changes to enter, click **Next.**



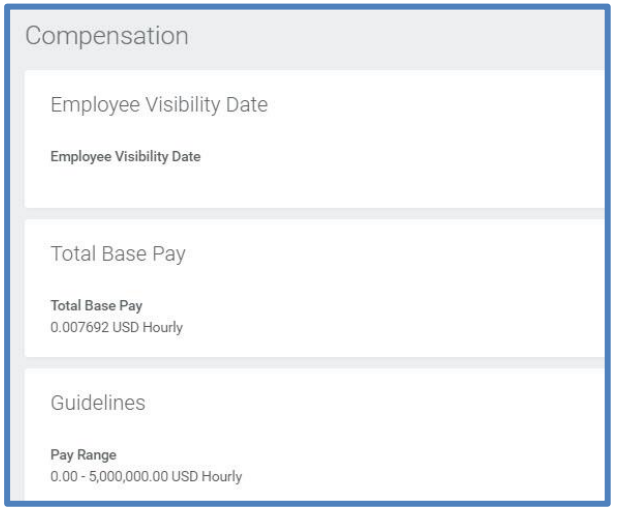
8. The Attachments page displays. Attach any documents and click **Next.**



9. The Organization Page displays. Click the **Edit** icon to access and complete any of the organization assignments. Click **Next.**



10. The Compensation page displays. Because lateral transfers don't typically involve compensation changes, click **Next.**



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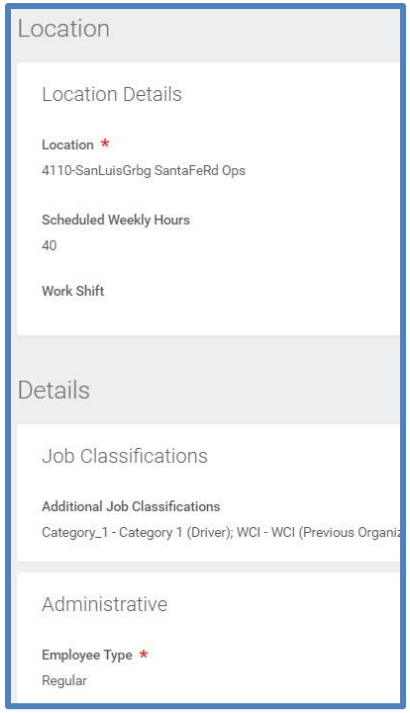
11. From the Summary page, Click the **Edit** icon to access and edit any of the details initially entered in the previous pages. Once done, click **Submit.**



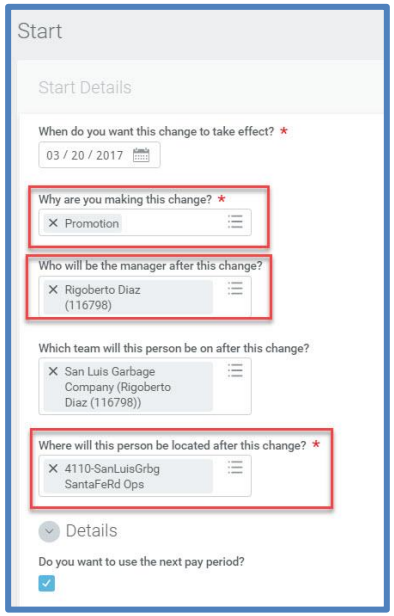
12. The lateral transfer will route for remaining approvals.

Promotions

When an employee is promoted, he/she will be moved into a different position which may possibly include a new supervisory organization, location, and/or compensation increase. The new position must exist before the promotion can be completed. If it has not been created, contact a recruiter for assistance.

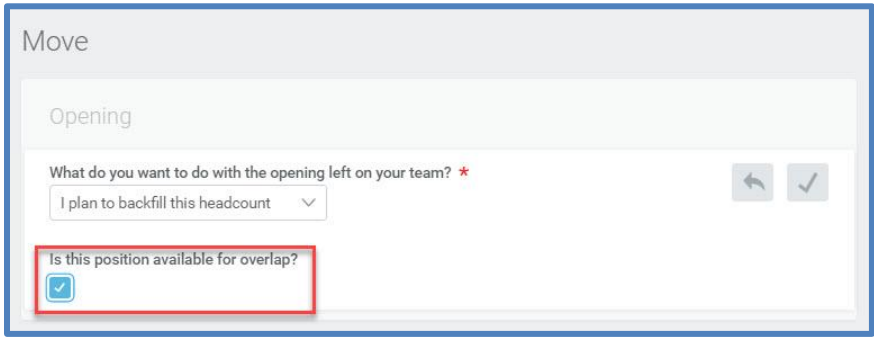
Step 1 – Promote the Employee (Current Manager)

1. From the My Team Worklet, click Transfer, Promote or Change Job
2. From the Change Job screen, select the worker to be promoted. Click **OK.**
3. From the Start page, enter the date the change should take effect or check the box in the Details section for the change to go in effect on the first day of the next pay period. Select Promotion in the "Why are you making this change?" field. Enter the name of the manager for the promotion in the "Who will be the manager after this change?" field. Once done, the "Which team will this person be on after this change?" field will default to the team of the manager entered previously. Update the location for the promotion in the "Where will this person be located after this change?" field. Click **Start.**

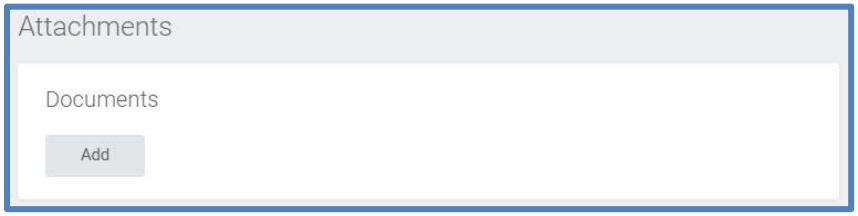


Transfers: Internal Transfers for Recruiters and Managers

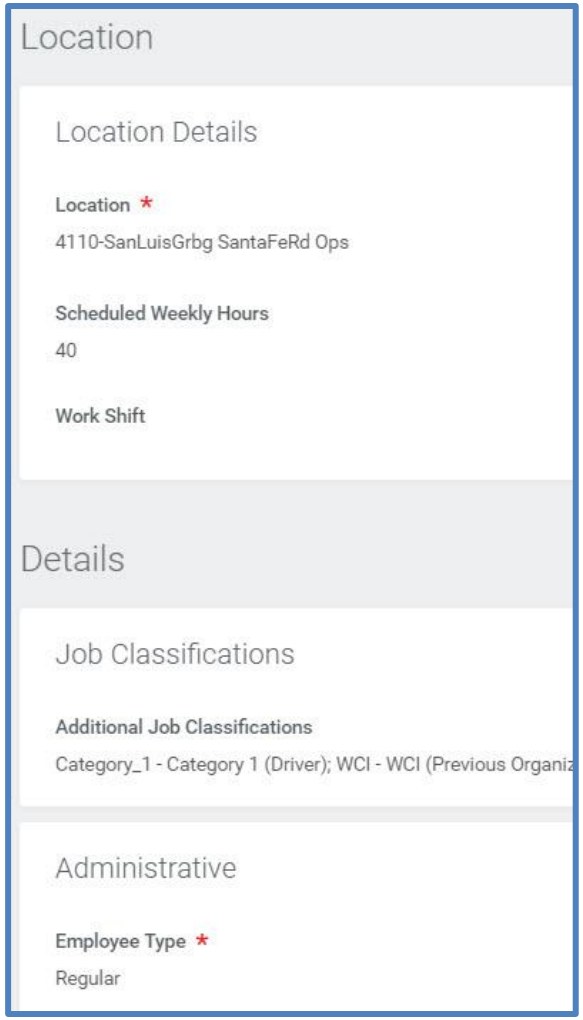
4. From the Move page, click the **Edit** icon and select if you'd like to backfill the position, move the headcount, or close the position. If you choose to backfill the position, always check the box to make the position available for overlap. Doing so will trigger the recruiting process to begin to fill the vacancy. Click **Next.**



5. The Attachments page displays. Attach any documents and click **Next.**



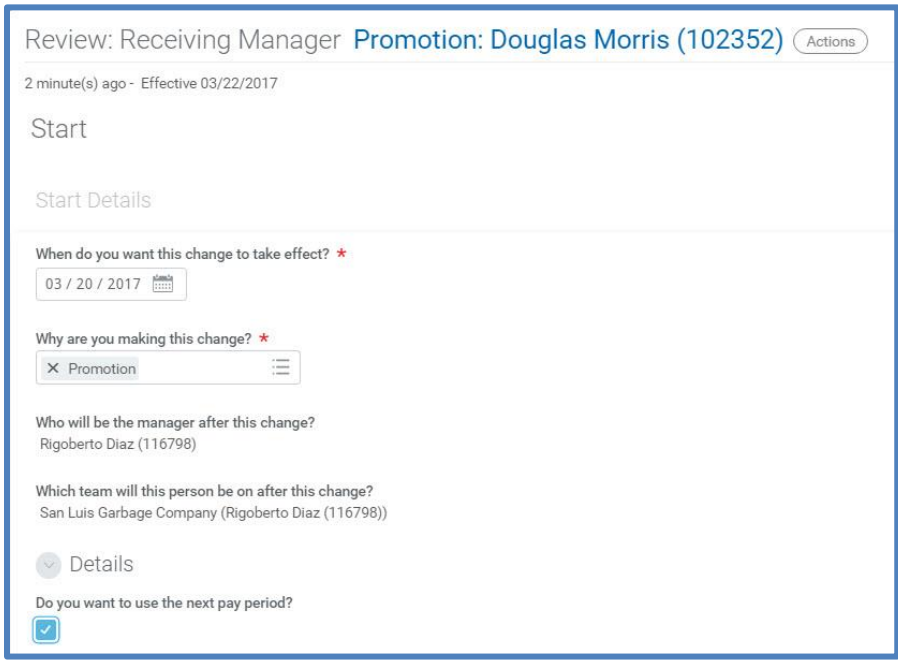
6. From the Summary page, Click the **Edit** icon to access and edit any of the details initially entered in the previous pages. Once done, click **Submit** to send to receiving manager**.**



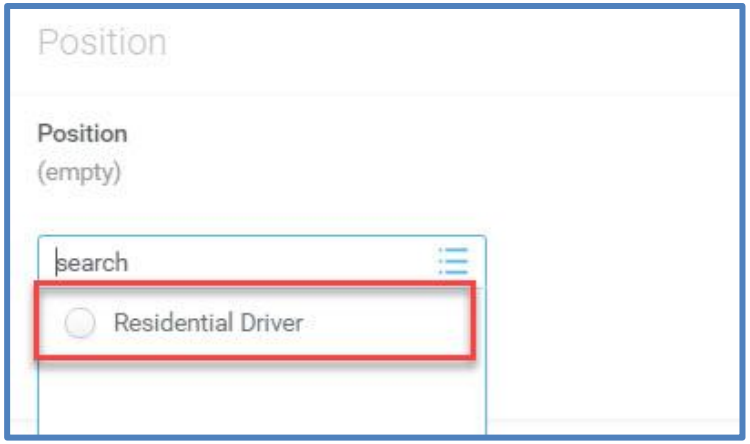
Step 2 – Review and Edit the Promotion (Receiving Manager)

Once the promotion has been submitted by the previous manager, the receiving manager will receive an inbox notification to review the promotion. The receiving manager must also, update the position, and compensation details and can make additional edits as necessary.

1. From the Start section of the page, click the **Edit** icon to access and edit any of the required or applicable fields. Once done, click the **Save** icon .



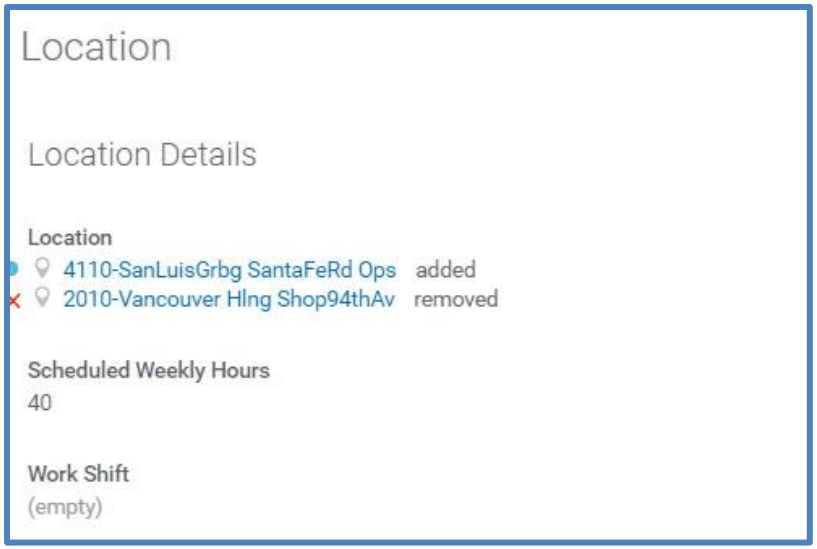
2. Scroll down to the Job section of the page. Click the **Edit** icon to enter the position. Access the drop-down menu and select the appropriate available position for the promotion. Once done, save the changes.



3. Scroll down to the Job Profile section of the page. Click the **Edit** icon to edit the job profile by accessing the drop-down menu and selecting the appropriate profile for the promotion. Remember that the job profile ties back to the GL code. Once done, save the changes.

4. Scroll down to the Business Title section of the page. Click the **Edit** icon to edit the business title. Once done, save the changes.

5. Scroll down to the Location section of the page. Edit if necessary and save the changes once done.



6. Scroll down to the Details section of the page and review the Job Classification selections. Edit if necessary and save any changes.

7. Scroll down to the Administrative section of the page. Edit if necessary and save any changes.

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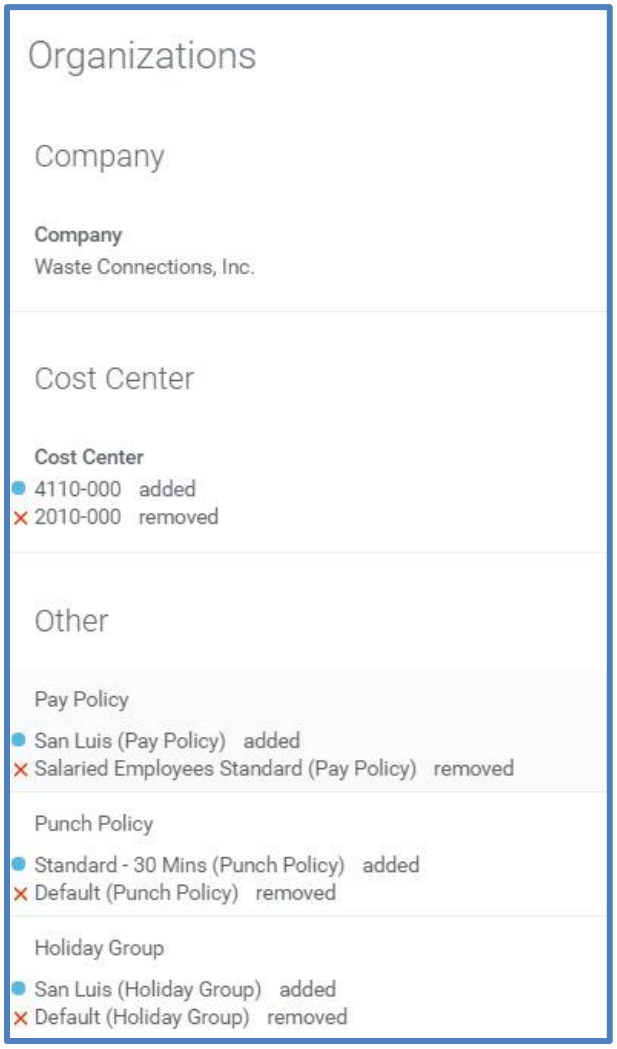
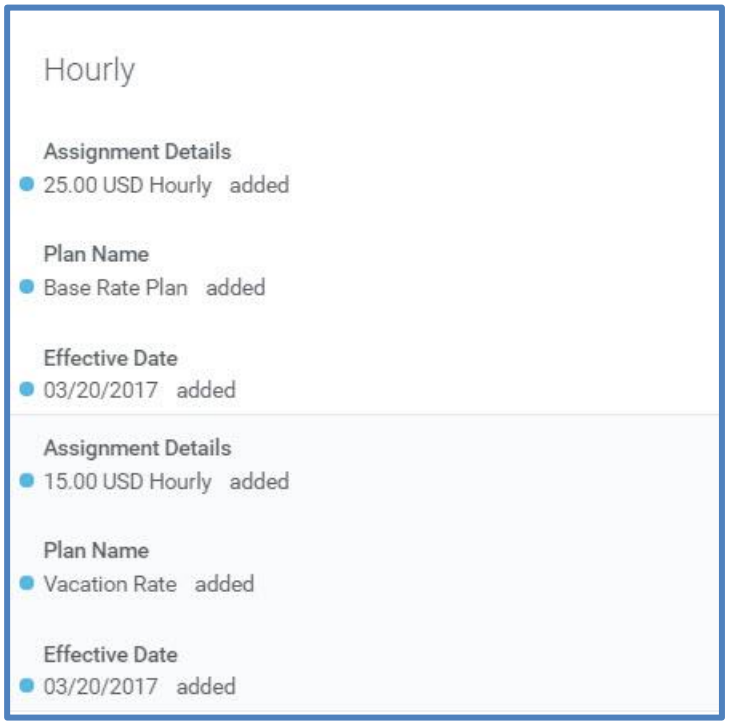
8. Scroll down to the Organizations section of the page. Edit and update the organization assignments (cost center, pay policy, punch policy, and holiday group). Once done, save all changes.



9. Scroll down to the Compensation section of the page. Click the **Edit** icon to edit the compensation section of the page (salary or hourly) which is appropriate for the promotion. Be sure to complete any additional Compensation sections that are relevant to the promotion such as Stock, Bonus, etc. Once done, save all changes. Click **Approve.**



Note: A soft alert may appear after clicking **Approve.** That is a known issue but won't prevent processing the promotion. Simply click **Approve** again and the approval process will begin.

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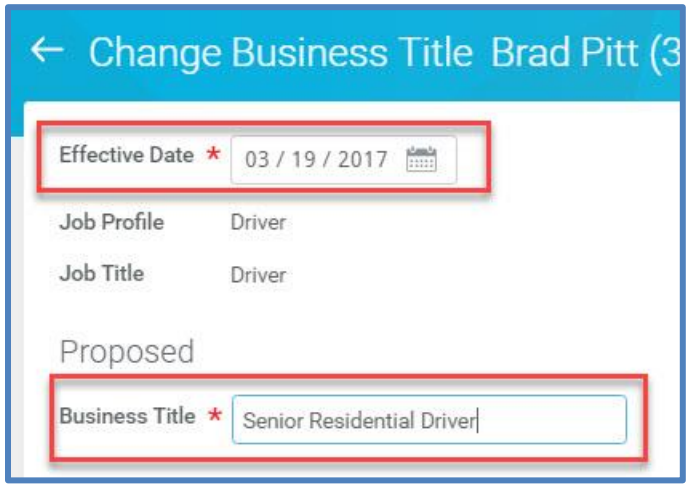
Business Title Change

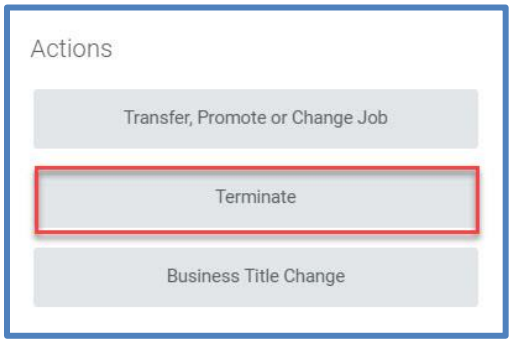
From the My Team worklet

1. Click **Business Title Change**
2. From the Change Business Title page, enter the effective date for the new title to appear and the new business title. Click **Submit.**



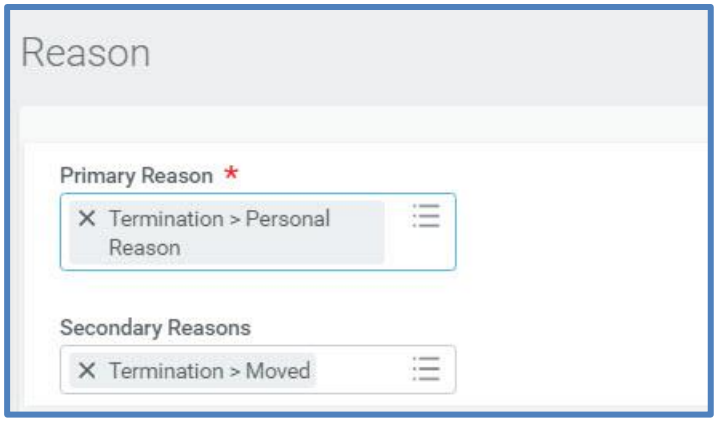
Terminations

From the My Team worklet, click **Terminate**.

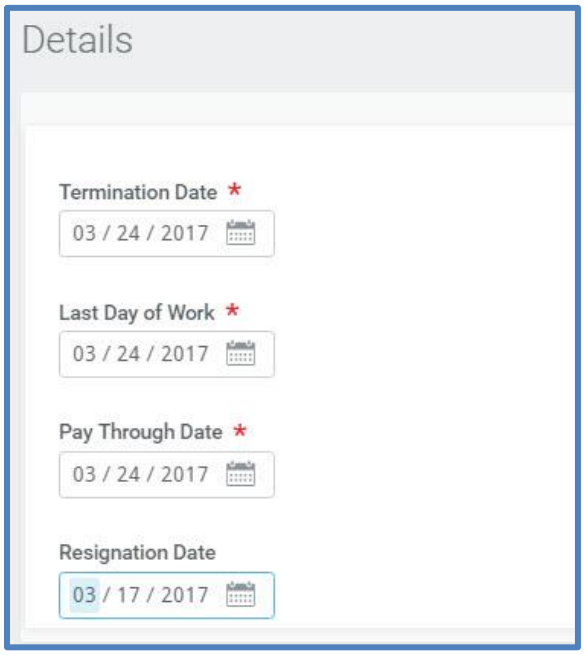


1. Select the employee to be terminated. Click **OK.**

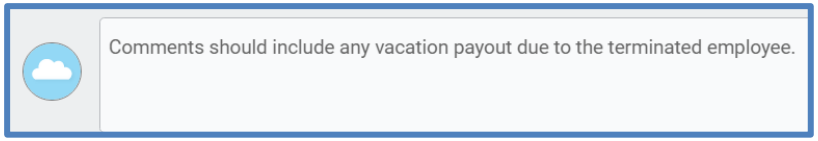
2. From the Terminate Employee page, click the **Edit** icon to edit the Reason section of the page. Enter the required primary reason and, if applicable, a secondary reason. Once done, save the changes.



3. Scroll down to the Details section of the page, enter the termination date, last day of work, and pay through date which are all required. The resignation date may also be entered. Once entered, save the edits.



Note: The Termination Date and the Pay Through Date must match.

4. Scroll down to the Position Details of the page. Click the **Edit** icon to check the box to close the position. Otherwise, click the box indicating the position is available for overlap to ignite the recruiting process to fill the vacancy.

5. Lastly, make sure that details are included in the Comments Section of the page stating the employee's vacation payout balance. Click **Submit.**