HCM: Job Change, Manager Change

Manager

Last Modified: July 1, 2025

About Job Changes in Workday

Change Job is a flexible business process used to update an employee's job-related details without terminating their employment. It covers actions like promotions, demotions, transfers, location changes, changes in work hours, job title updates, or moving an employee to a different supervisory organization. The process ensures that all associated records—such as compensation, security access, and organizational structure—are updated accurately to reflect the employee's new role or details.

Refer to the Reason Table for full details.

Things to Consider When Managing Worker Changes

1. **Correct Reason and Action**
   Choose the appropriate reason code (e.g., promotion, transfer, location change) to ensure accurate reporting and downstream processes.

2. **Effective Date**
   Set the right effective date so payroll, benefits, and other integrations process changes correctly.

3. **Impact on Compensation**
   Review and update salary or allowances if the change impacts compensation.

4. **Security and Approvals**
   Be aware of approval chains and security restrictions tied to job changes, especially for sensitive roles or organizations.

5. **Position Availability**
   If moving the employee to a new position, confirm that the position is open and has the right attributes (location, cost center, effective date, overlap option, etc.).

6. **Business Process Triggers**
   Know that some changes (like location or supervisory org) may trigger additional tasks, such as security updates, benefit changes, or onboarding steps.

7. **Communicate with Stakeholders**
   Keep the employee, managers, and HR informed to avoid surprises and ensure a smooth transition.

Note: Refer to the Change Job Reason Table for a full view of all Options.

Note: This is a standalone business process for all Worker Changes. It can be initiated by the Current Manager, or in cases when a Worker is transferring to a new team, can be initiated via the "Request Transfer" business process.

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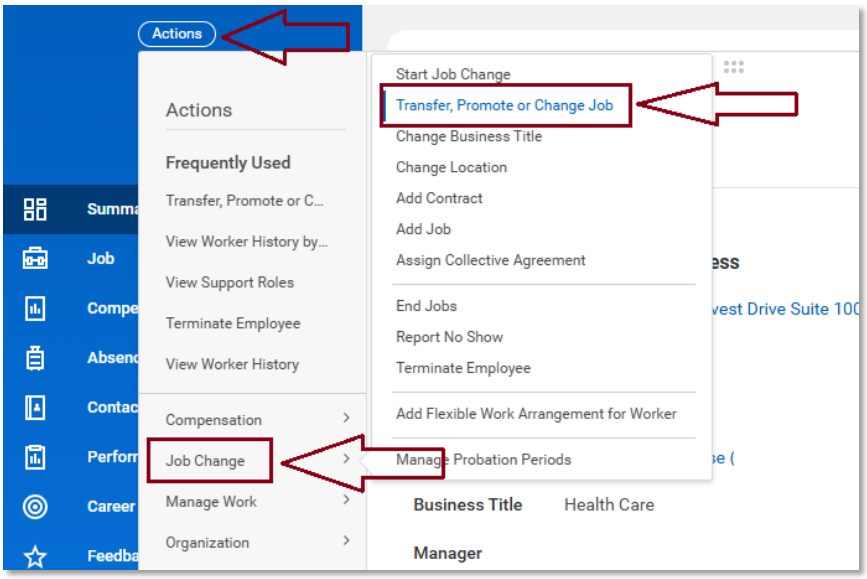
How to Initiate a Job Change

1. From the related actions menu of a worker, select **Job Change > Transfer, Promote, or Change Job**.



2. Click on the "pencil" icon to make changes.
   a. A new form will open up for you to fill out.
   b. Enter **effective start date** – this is when the change will take effect.
   c. Select a **reason** for the change (refer to the Reason Table for guidance).
   d. If a **manager change** is required, enter the new manager's name.
   e. If **location change** is required, update location **physica**l (street) address.
   f. If the change effective start date matches next pay period start date – select "Yes". Otherwise, select "No" if you are backdating the change or it will happen in the distant future.

Commented [LR1]: @Kristie Dierig can we please add something like: "a new form will open up for you to fill out"

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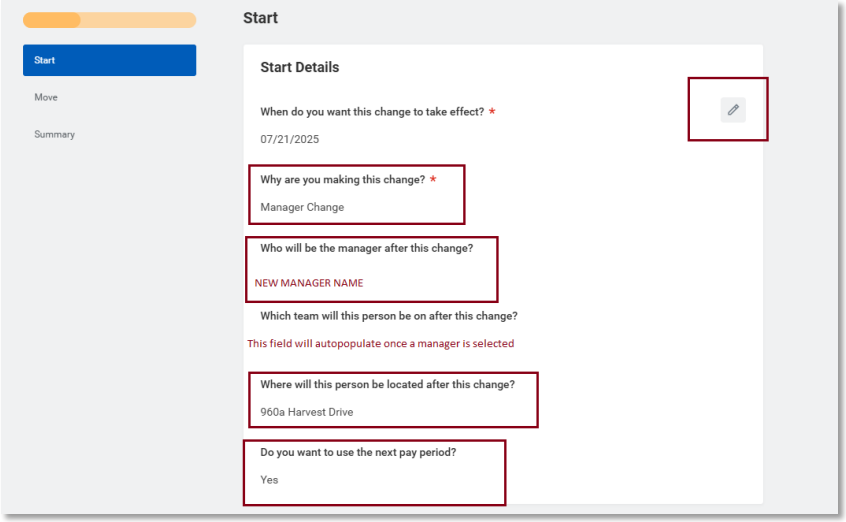

FOR MANAGER MOVES (change Job):

3. MOVE – when the worker is moving to a new organization/ manager, the "move" form will appear:
   a. Select "**I plan to backfill this headcount**" – If you need to keep the position in your hierarchy and you plan to hire another employee into this position.
   b. Select "**Move this headcount to the new manager**" – if you do not plan to keep the position open under your hierarchy and would like employee ***and*** the position move to the new manager.
   c. Select "**Close this headcount**" – When you do not plan to keep this position open and employee moves to another position, so the position is no longer needed.

Note: Security is most commonly assigned to the Position. Therefore, it's advised to keep positions in your organization, where the work will remain the same, and then move a Worker into it versus moving the Worker with the Position and/or creating a new one.

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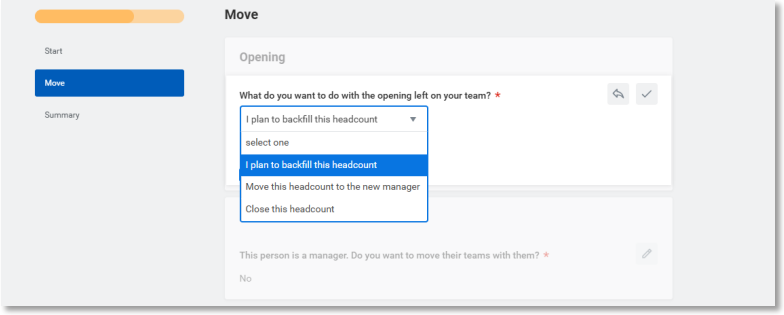

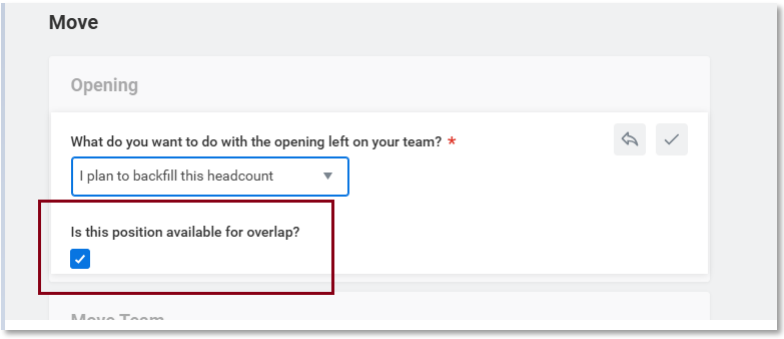

Note: "**Is this position available for overlap**?" – if you selected to backfill the position, you will be asked to select Yes (check) or No for this question. "Overlap" means two employees can temporarily occupy the same position (chair).

Use case scenario: an employee can be set to arrive in the "new" position BEFORE the incumbent moves to their new position, to allow for training purposes. In effect, this one position will have 2 employees in it during this overlap period, until the incumbent moves to the new position by the time of the effective date.

4. MOVE TEAM – when an employee being transferred is a Manager, with other employees reporting to them:
   a. Select "**Yes**" if the team will follow the manager (they will keep the same reporting structure)

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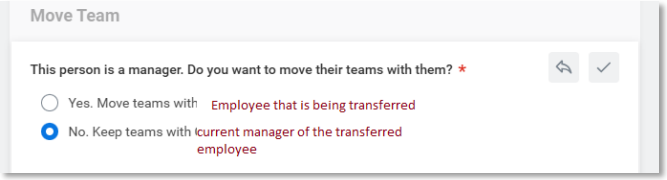
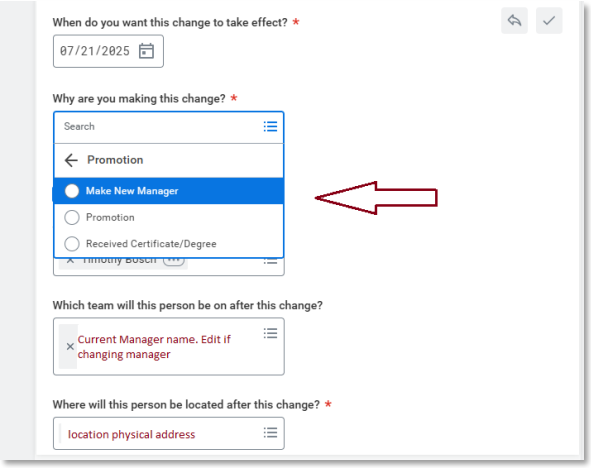
b. Select "**No**" if the team will remain under the current Position, until a new Worker comes in. This means the Manager's Manager will "inherit" the team, visually via the Org Charts and via the Manager listing in Workday, until the new manager has an effective date in the open position:



5. Summary page will allow you to review your changes.
6. Click on "Submit" after review.
7. Next Steps:
   a. Future Manager review and approval
   b. Manager's Manager review and approval
   c. HR Partner – Review and Approval
   d. Current Manager – costing allocation (can skip)
   e. Completed

FOR PROMOTION (change Job):

1. From the same starting page of this Business Process, choose Reason "Promotion".
2. If this person will be managing a Team after the promotion, choose "Make a New Manager" instead. Do not select this if they are already in a supervisory position.



3. In the next screen fill out job details:

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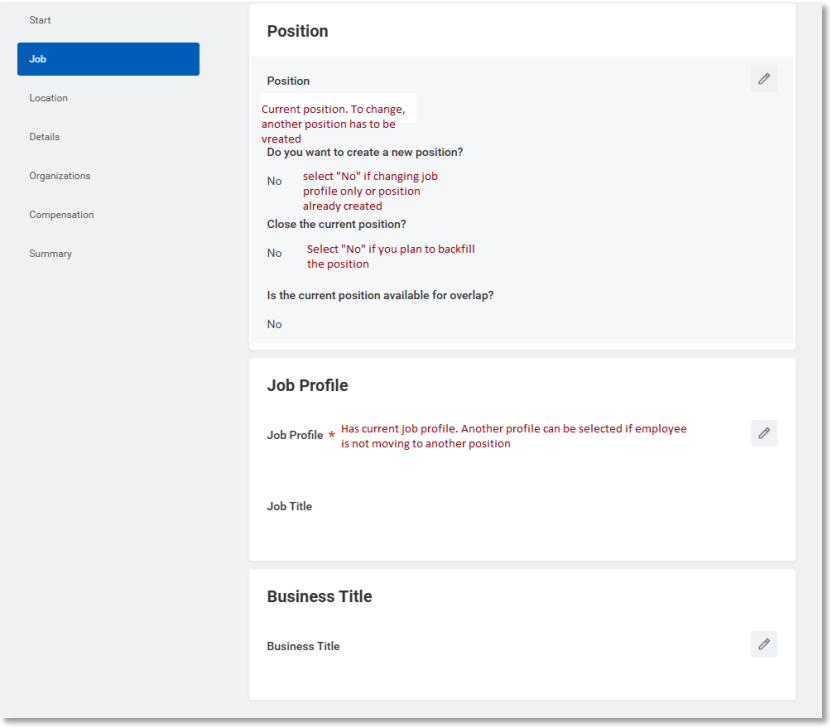

Note: If you plan to hire another employee in the promoted employee current position, you will need to have a position created for a promoted employee first.

You can also promote employee without creating a position, think about it as changing a label on the chair seat – promoted employee occupies the same chair, but the title and other attributes (pay rate, etc…) change.

4. If needed update Location. This is a location physical (street) address:

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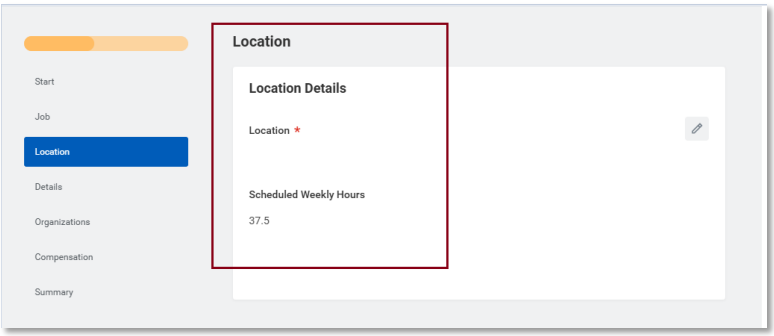
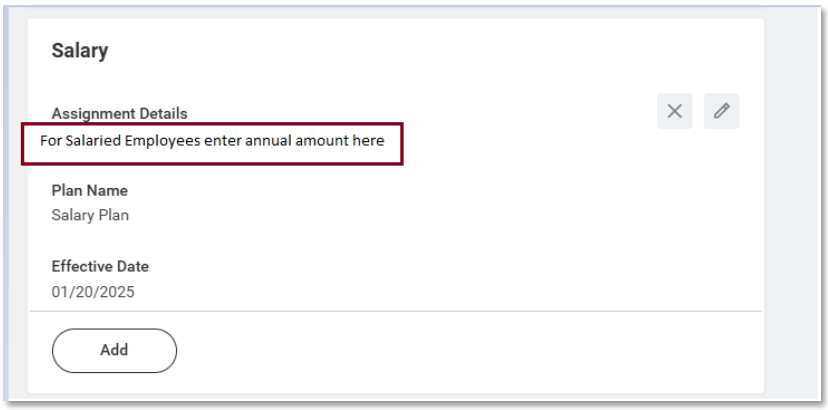


5. Review Job Details, make changes if needed.
6. Review Company and Cost center.
7. Review Compensation. If the employee is Hourly, you will enter their compensation under “Hourly” category; for Hourly employees please enter rate per hour. For Salaried employees please enter annual amount under category “Salary”:



8. Review and Submit.
9. Next Steps:
    a. Manager's Manager Review and approval
    b. HR Partner - Review and Approve
    c. Current Manager: Assign Costing Allocations (can be skipped*)
    d. Assign PayGroup - verify (Payroll may provide instruction on selecting correct Pay group)

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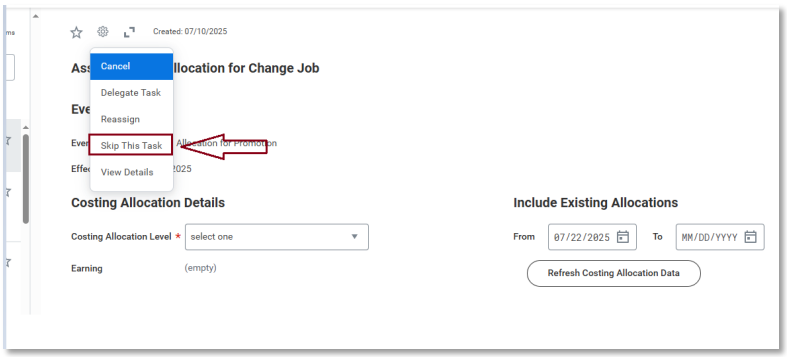
10. If the Worker will not have split allocations, this step can be skipped by clicking on the "Skip the task":



Result

Workday notes the changes on the Worker according to the details that are approved and on the effective date.

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JOB CHANGE CATEGORIES AND REASONS

Change Job Category	*Reason Category	Inactive		Change Job	*Reason	*Change Job Type
	Transfer	☑				
					Move to Another Manager	Transfer
	Manager Change	☐				
					Correction - Manager Change	Transfer
					Manager Change	Transfer
	Hours Changes	☐				
					Change to Part-Time	Data Change
					Change in Hours	Data Change
					Change to Full-Time Status	Data Change
	Lateral Move/Position Change	☐				
					Move to Another Position on My Team	Lateral Move
					Transfer to Another Position	Lateral Move
					Transfer to Another Position	Lateral Move
	Corrections and Data Changes	☐				
					Correction-Department	Data Change
					Correction - Location Change	Data Change
					Correction-Job Code	Data Change
					Correction	Data Change
					Correct Position Entry Date	Data Change
					Correction-Pay Rate	Data Change
	Data Changes	☐				
					Data Conversion	Data Change
					Change Job Details	Data Change
					Change Location	Data Change
					Change Contingent Worker Details	Data Change
					Data Change	Data Change

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	Department/Location Change					
					Move to Another Department	Data Change
					Correction - Location Change	Data Change
					Move to Another Location	Data Change
	Promotion					
					Make New Manager	Promotion
					Promotion	Promotion
					Received Certificate/Degree	Promotion
	Demotion					
					Demotion	Demotion
					Decrease in Responsibility	Demotion