

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.

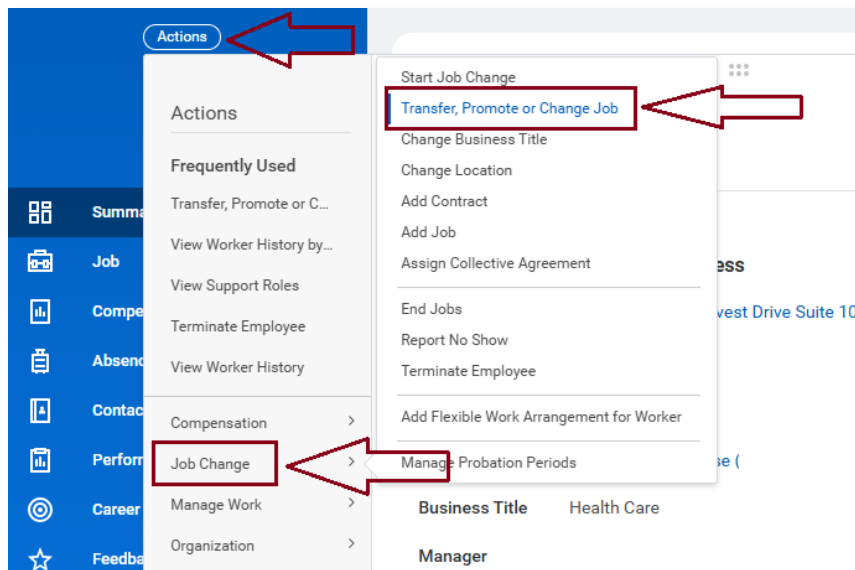
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How to Initiate a Job Change

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 **physical** (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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Start

Start Details

When do you want this change to take effect? *

07/21/2025

Why are you making this change? *

Manager Change

Who will be the manager after this change?

NEW MANAGER NAME

Which team will this person be on after this change?

This field will autopopulate once a manager is selected

Where will this person be located after this change?

960a Harvest Drive

Do you want to use the next pay period?

Yes

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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Move

Start

Move

Summary

Opening

What do you want to do with the opening left on your team? *

I plan to backfill this headcount
select one
I plan to backfill this headcount
Move this headcount to the new manager
Close this headcount

This person is a manager. Do you want to move their teams with them? *

No

Move

Opening

What do you want to do with the opening left on your team? *

I plan to backfill this headcount

Is this position available for overlap?

☒



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.

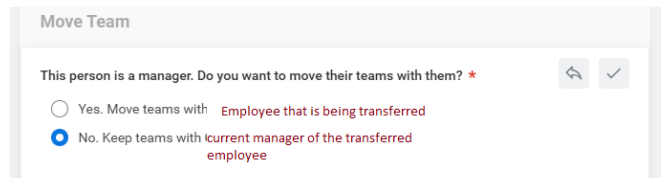
4. MOVE TEAM – when an employee being transferred is a Manager, with other employees reporting to them:
 - a. Select “Yes” if the team will follow the manager (they will keep the same reporting structure)

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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:



Move Team

This person is a manager. Do you want to move their teams with them? *

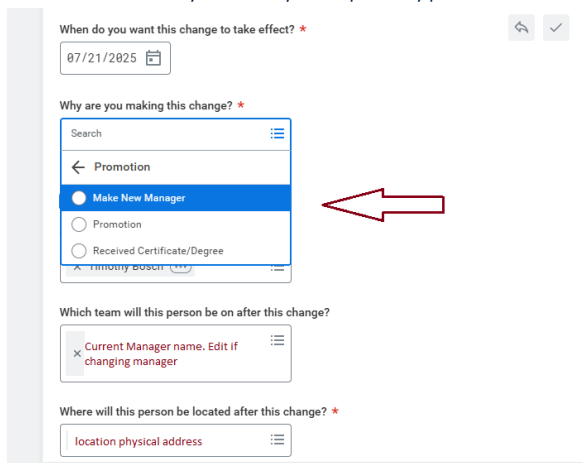
☐ Yes. Move teams with Employee that is being transferred

☒ No. Keep teams with current manager of the transferred employee

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.



When do you want this change to take effect? *

07/21/2025

Why are you making this change? *

Search

← Promotion

● Make New Manager

○ Promotion

○ Received Certificate/Degree

Which team will this person be on after this change?

× Current Manager name. Edit if changing manager

Where will this person be located after this change? *

location physical address

3. In the next screen fill out job details:

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Start

Job

Location

Details

Organizations

Compensation

Summary

Position

Position

Current position. To change, another position has to be created

Do you want to create a new position?

No select "No" if changing job profile only or position already created

Close the current position?

No Select "No" if you plan to backfill the position

Is the current position available for overlap?

No

Job Profile

Job Profile * Has current job profile. Another profile can be selected if employee is not moving to another position

Job Title

Business Title

Business Title



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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The screenshot shows the HCM Manager interface with a sidebar on the left containing links: Start, Job, Location (highlighted in blue), Details, Organizations, Compensation, and Summary. The main content area is titled 'Location' and contains a 'Location Details' section. This section has a 'Location' field with a red asterisk and a 'Scheduled Weekly Hours' field with the value '37.5'. A red rectangular box highlights the 'Location Details' section. There is an edit icon (pencil) to the right of the 'Location' field.

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”:

The screenshot shows the HCM Manager interface with a sidebar on the left containing links: Start, Job, Location, Details, Organizations, Compensation, and Summary. The main content area is titled 'Salary' and contains an 'Assignment Details' section. This section has a text field with the placeholder text 'For Salaried Employees enter annual amount here', which is highlighted by a red rectangular box. Below this field are the 'Plan Name' (Salary Plan) and 'Effective Date' (01/20/2025). There is an 'Add' button at the bottom. There are close (X) and edit (pencil) icons to the right of the 'Assignment Details' section header.

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":

Created: 07/10/2025

Allocation for Change Job

Cancel

Delegate Task

Reassign

Skip This Task

View Details

Allocation for Promotion

Costing Allocation Details

Costing Allocation Level * select one

Earning (empty)

Include Existing Allocations

From 07/22/2025 To MM/DD/YYYY

Refresh Costing Allocation Data

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
Q	Transfer	<input checked="" type="checkbox"/>	+		
				Move to Another Manager	Transfer
Q	Manager Change	<input type="checkbox"/>	+		
				Correction - Manager Change	Transfer
				Manager Change	Transfer
Q	Hours Changes	<input type="checkbox"/>	+		
				Change to Part-Time	Data Change
				Change in Hours	Data Change
				Change to Full-Time Status	Data Change
Q	Lateral Move/Position Change	<input type="checkbox"/>	+		
				Move to Another Position on My Team	Lateral Move
				Transfer to Another Position	Lateral Move
Q	Corrections and Data Changes	<input type="checkbox"/>	+		
			-	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
Q	Data Changes	<input type="checkbox"/>	+		
			-	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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Q	Department/Location Change	<input type="checkbox"/>	⊕			
					Move to Another Department	Data Change
					Correction - Location Change	Data Change
					Move to Another Location	Data Change
Q	Promotion	<input type="checkbox"/>	⊕			
					Make New Manager	Promotion
					Promotion	Promotion
			⊖		Received Certificate/Degree	Promotion
Q	Demotion	<input type="checkbox"/>	⊕			
					Demotion	Demotion
			⊖		Decrease in Responsibility	Demotion