HCM: Request Work Transfer

Manager

Last Modified: July 1, 2025

About Request Transfers in Workday

Request Transfer is a business process used to move an employee from one position, location, department, or supervisory organization to another within the same company. It's commonly initiated by managers and can involve updates to the employee's job details, compensation, location, and reporting relationships. This process ensures that all related records—such as security access, payroll, and organizational charts—are updated seamlessly to reflect the employee's new role.

Things to Consider When Requesting a Transfer

- You may request a transfer for any worker outside your current organization (a.k.a. Your team). The request routes to the worker's current manager for approval, then comes back to you so you can enter job details and other relevant information. This Business Process can also be considered a precursor to the full Change Job business process.

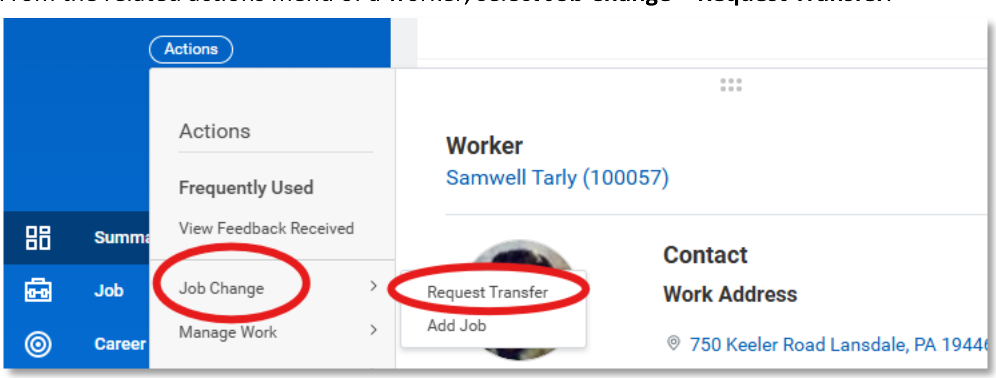
- When you use Request Transfer ahead of the Change Job business process, you will only see the "Start" and "Move" sections. After the worker's current manager (a.k.a. Sending Manager) approves the transfer, the new manager (a.k.a Receiving Manager) completes the fields in the rest of the sections, including Job, Location, Details, Attachments, Organizations and Compensation.

- Example: You want to bring Alisha Vargas into your organization from Organization B. You can't initiate a Change Job because she isn't in your organization. You initiate a Request Transfer. Peter Smith is in your Organization, A, meaning you manage him. You want to move him to Organization B. You initiate a Change Job for Peter Smith, or else the New or Receiving manager submits a Request Transfer process.

Note: Refer to the Change Job - Job Aid for full details in all aspects of the Change Job Business Process.

How to Request a Transfer

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



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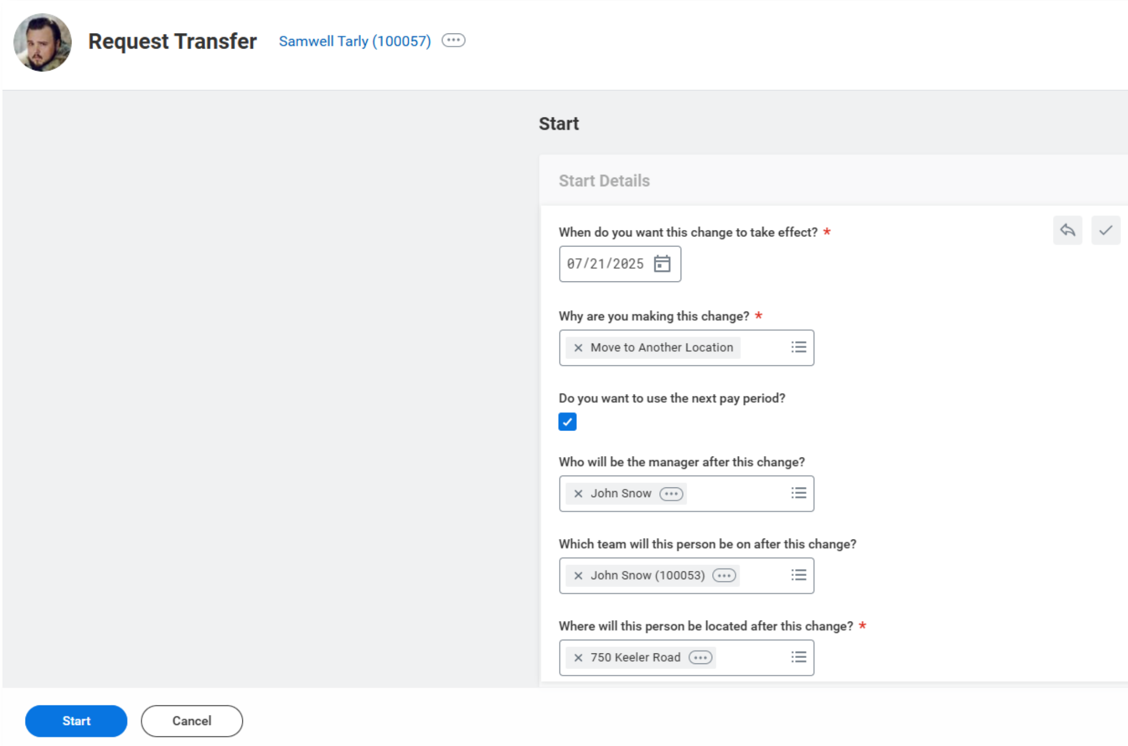
2. In the **Start** section, select the date, reason, manager, and location.

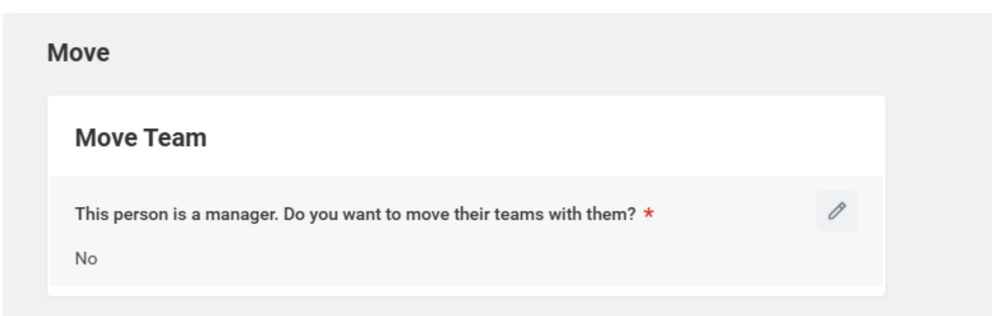


<u>Note</u>: If you're a manager, Workday automatically populates your name and organization. If you manage multiple organizations, you can select a different organization.

3. Press **Start**

4. Review the data values on the screen

5. If the employee you are requesting transfer for is a manager, you will be asked if you want to move their team with them (all employees who directly report to the employee you are moving):



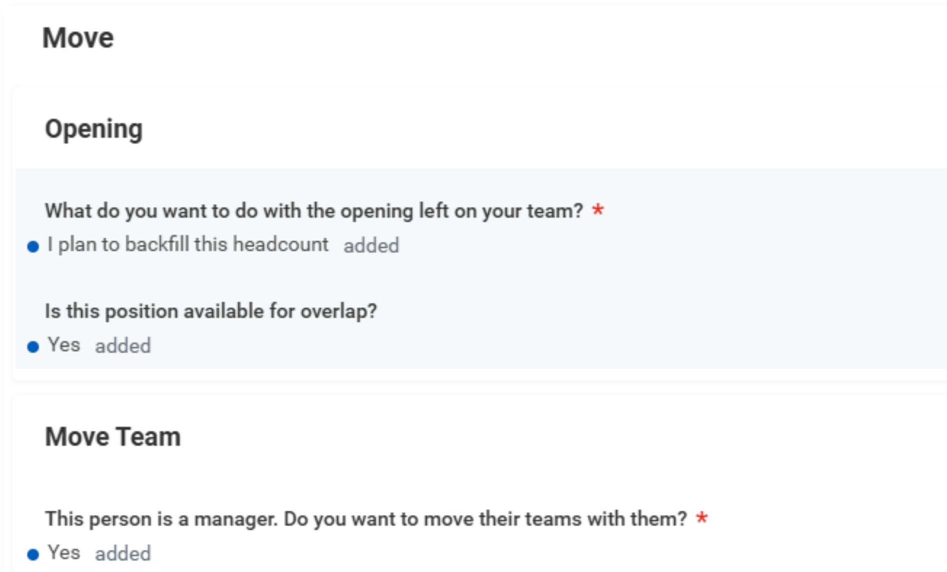
a. Select “Yes” if you want to move the entire team along with the employee

b. Select “No” if you do not wish to move the team with their manager. In this scenario, current manager will inherit the team (Ex: Lisa and Ana directly report to Sam and Sam reports to Maria. Lucas requested to transfer Sam to his team and selected to not move Sam’s team. After the transaction is completed, Lisa and Ana will be directly reporting to Maria)

6. Click **Submit.**

7. The form will go to Employee’s current or sending manager.

8. The Current or Sending manager will be asked to review the change and make a decision about the employee move and the related position they are in:



a. Specify whether to backfill, move, or close the headcount (or position)

b. Specify whether the position is available for overlap before the worker transfers. This option is available when the manager plans to backfill the position, the transfer date is in the future, your Workday tenant is enabled for job overlap, and the organization uses the position management staffing model.

c. Complete the values based on your Position Management plans.

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9. Once the Current Manager completes their steps, the process goes back to the new or receiving manager to enter job details and other relevant information including **Job, Location, Details, Attachments,** and **Compensation.**
10. Next step goes to HR Partner for approval
11. The last step the business process will return back to you to allow you to enter Cost Allocations. This task can be skipped, if no split allocations required.

Result

Workday adds the *Transfer* event to the worker's history.