Transfer

A Transfer is a position change that takes place **outside of the employee's current Sup Org.**

Reasons within a Transfer are **Transfer – Promotion** (increase in compensation) or **Transfer – Lateral** (compensation stays the same or goes down).
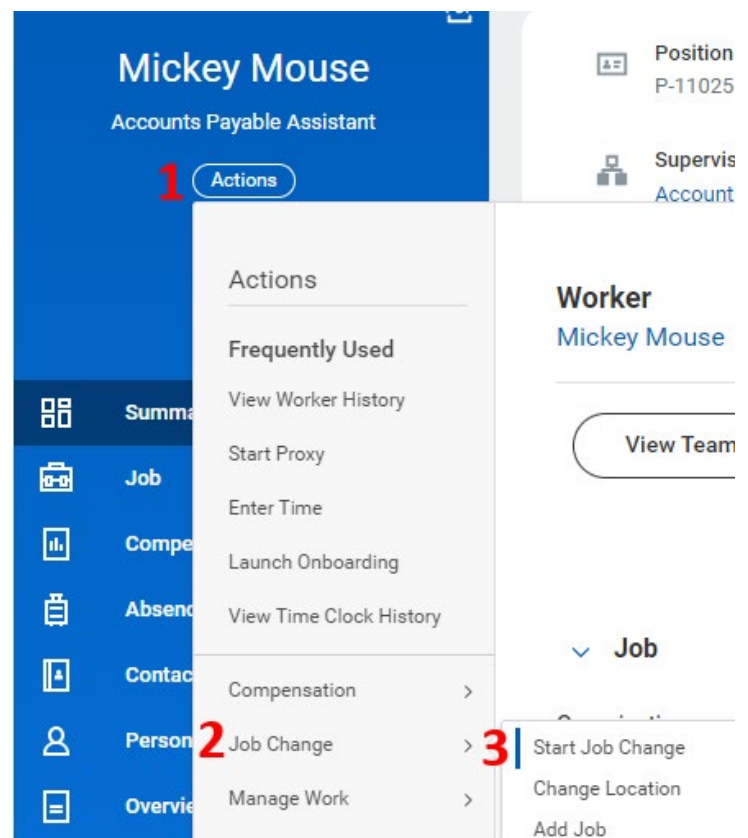
If you are the employee's current HR Analyst

1. Go to the employee's Workday profile.

    Click **Actions**.

    Hover over **Change Job**.

    Click **Start Job Change**.

2. Select either **Transfer – Lateral** (no pay change or pay goes down) or **Transfer – Promotion** (pay increase).

Click **OK**.

Start Job Change

What do you want to do? *

Search	☰
◯ Data Change - Location Changing	
◯ Data Change - Employment End Date	
◯ Data Change - Job Title and Business Title Changing	
◯ Lateral Move - Change in Responsibility	
◯ Lateral Move - Move to Another Position	
◯ Promotion - Promotion Inside of Supervisory Organization	
◯ Transfer - Lateral	
◯ Transfer - Promotion	

3. Choose the **Date** (automatically set to beginning of the next pay period).

Update "**Who will be the manager after this change?**" and "**Which team will this personal be on after this change?**".

Update the **Location** if necessary.

Click **Start**.

Start Details

When do you want this change to take effect? *
● 11/12/2023 added

Why are you making this change? *
● Lateral added

Who will be the manager after this change?
● Walt Disney added
✕ Buzz Lightyear removed

Which team will this person be on after this change?
● IT Customer Support - Helpdesk Campus Support (Walt Disney) added
✕ Accounts Payable (Buzz Lightyear) removed

Where will this person be located after this change? *
⊙ Lynchburg - In Office

Do you want to use the next pay period?
● Yes added

Start

4. Select the appropriate response to "**What do you want to do with the opening left on your team?**" and "**Is this position available for overlap?**" Selecting "I plan to backfill this headcount" and "Yes" will leave the position open and allow you to begin hiring into the role that will be opening up immediately.

   Submit.

Move

Opening

What do you want to do with the opening left on your team? *
● I plan to backfill this headcount   added

Is this position available for overlap?
● Yes   added

Submit

5. The **Receiving HR Analyst** (the HR Analyst on the employee's new team) will have the next task. They will input the **Position** and **Job Profile** the employee will be transferring to.

Position

Position
● P-2026867 Apprentice - IT Helpdesk Campus

Job Requisition
● R0000688 Apprentice - IT Helpdesk Campus

Job Profile

Job Profile *
● Campus Support Apprentice   added
✕ Accounts Payable Assistant   removed

The **Receiving HR Analyst** will then need to scroll down to **Documents** and attach the employee's **Career Mobility Form**.

Attachments

Documents

(Add)

Click **Approve**.

Approve

6. The transfer then goes through approvals by the **Recruiting Partner**, **Compensation Manager**, **HR Partner**, **Compensation HR Office Partner**, **Compensation Manager**, and the **Proposed HR Analyst**.

Once all approvals have been given, the employee will receive the Change Benefit Elections task.

Success! Event approved

Up Next: Recruiting HR Office Partner | Approval by Recruiting HR Office Partner | Due Date 11/11/2023
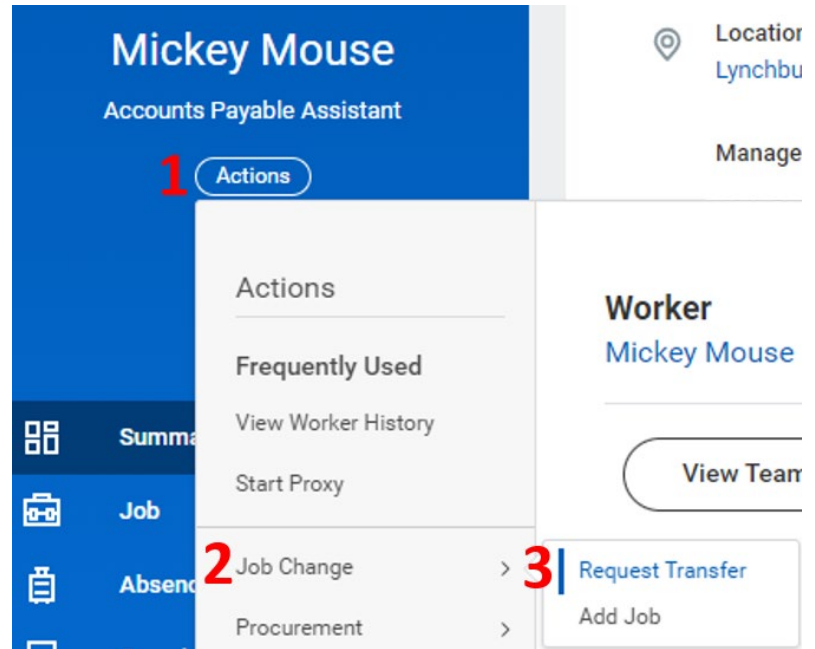
View Details

If you the HR Analyst for the team the employee will be joining

1. Go to the employee's Workday profile.

   Click **Actions**.

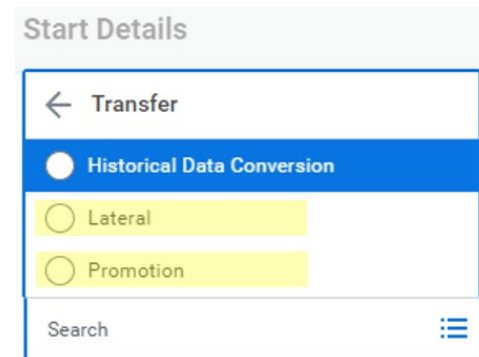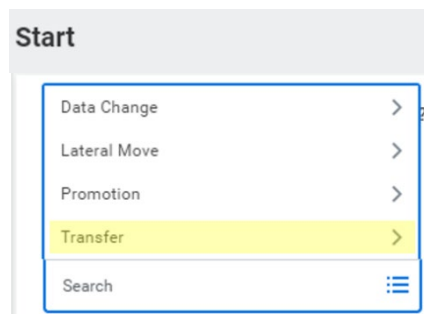   Hover over **Change Job**.

   Click **Request Transfer**.

2. Select **Transfer**.

   Select either **Lateral** (no pay change or pay goes down) or **Promotion** (pay increase).

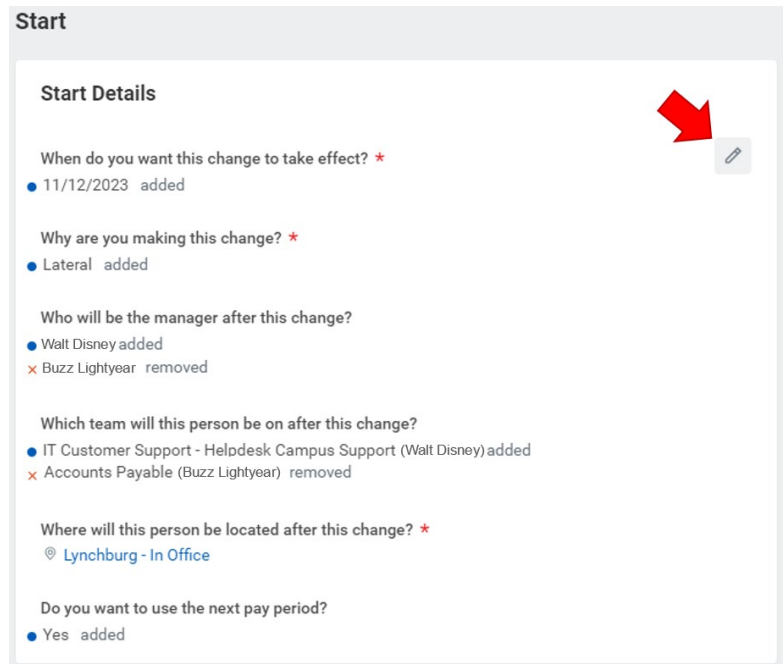   Do **not** select Historical Data Conversion.

3. Choose the **Date** (automatically set to beginning of the next pay period).

   Update "**Who will be the manager after this change?**" and "**Which team will this personal be on after this change?**".
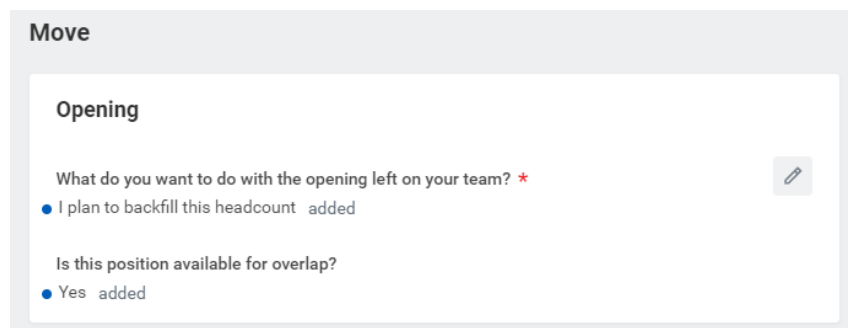
   Update the **Location** if necessary.

   Click **Start**.

Start

Start Details

When do you want this change to take effect? *
- 11/12/2023 added

Why are you making this change? *
- Lateral added

Who will be the manager after this change?
- Walt Disney added
- ✗ Buzz Lightyear removed

Which team will this person be on after this change?
- IT Customer Support - Helpdesk Campus Support (Walt Disney) added
- ✗ Accounts Payable (Buzz Lightyear) removed

Where will this person be located after this change? *
- ⊙ Lynchburg - In Office

Do you want to use the next pay period?
- Yes added

Start

4. The employee's **Current HR Analyst** will receive a task to approve the details you have inputted so far. They will also select the appropriate response to "**What do you want to do with the opening left on your team?**" and "**Is this position available for overlap?**" Selecting I plan to backfill this headcount and yes will leave the position open and allow you to begin hiring immediately.

   Submit.

Move

Opening

What do you want to do with the opening left on your team? *
- I plan to backfill this headcount added

Is this position available for overlap?
- Yes added

Submit

5. The Transfer goes back to the **Receiving HR Analyst**. You will input the **Position** and **Job Profile** the employee will be transferring to.

Position

Position
● P-2026867 Apprentice - IT Helpdesk Campus

Job Requisition
● R0000688 Apprentice - IT Helpdesk Campus

Job Profile

Job Profile *
● Campus Support Apprentice   added
✕ Accounts Payable Assistant   removed

You will then need to scroll down to **Documents** and attach the employee's **Career Mobility Form**.

Attachments

Documents

(Add)

Click **Approve**.

(Approve)

6. The Transfer then goes through approvals by the **Recruiting Partner**, **Compensation Manager HR Partner**, **Compensation HR Office Partner**, **Compensation Manager**, and the **Proposed HR Analyst**.

Once all approvals have been given, the employee will receive Change Benefit Elections task.

Success! Event approved

Up Next: Recruiting HR Office Partner | Approval by Recruiting HR Office Partner | Due Date 11/11/2023

View Details