Change Job Process for Undergraduate and Graduate Student Employees

The following describes the process of making changes to an existing and active undergraduate or graduate student employee job/position. All change job requests should be initiated at least two weeks prior to the intended effective date.

WHO CAN INITIATE this process?

- Administrative Assistant
- Manager

*DO NOT USE THIS PROCESS for the following:

- Changing a Student Worker to a Federal Work Study Student Worker or vice versa. You must add an additional job instead.

- Changing a Student Worker to a Temporary Employee or vice versa. You must add an additional job instead.

- Changing the hourly rate for an existing job/position. You must use the Request Compensation Change process if you only want to change the hourly rate.

- Changing only the cost center that the employee is being paid from. You must use the Change Organization Assignment process instead.

- Changing only the costing allocation details for a job/position. You must use the Assign Costing Allocation process instead. Costing allocation details are only added for job/positions funded by a grant or gift OR a split funded job/position.

ONLY USE THIS PROCESS for the following:

- Extending the end date of an existing job/position.

- Ending an existing job/position earlier than the original end employment date entered.

- Changing the Job Title/Business Title of an existing job/position.

- Moving an existing job/position to a different supervisory organization that you support. This means you have to be the Manager or the Administrative Assistant of the new supervisory organization.

- Changing **both** the default organization assignment (fund, cost center, program, division) AND the costing allocation details (grant, project, gift, activity code) for an existing job/position. Costing allocation details are only added for positions funded by a grant or gift OR a split funded positions.

If you have any questions or encounter any errors during this process contact Workday Customer Care (973-655-5000 option 3 or WCCSupport@montclair.edu).

Approval Workflow in Workday

1) Initiation of process by Administrative Assistant or Manager

2) Approval by Human Resources

3) Approval by Manager (this step is skipped if the process was initiated by the Manager)

Instructions

1) There are two ways to initiate the change job process.

    1. **Option 1**: In the Workday search bar type **Start Change Job** and select the Start Job Change Task.
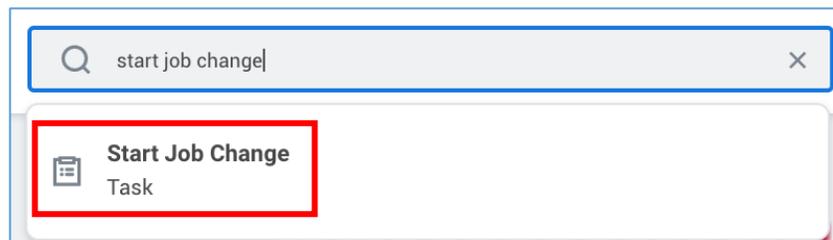
    2. **Option 2**: Go to the employee's worker profile by searching for the employee in the Workday search bar. Click on the related actions icon → Job Change →Start Job Change.
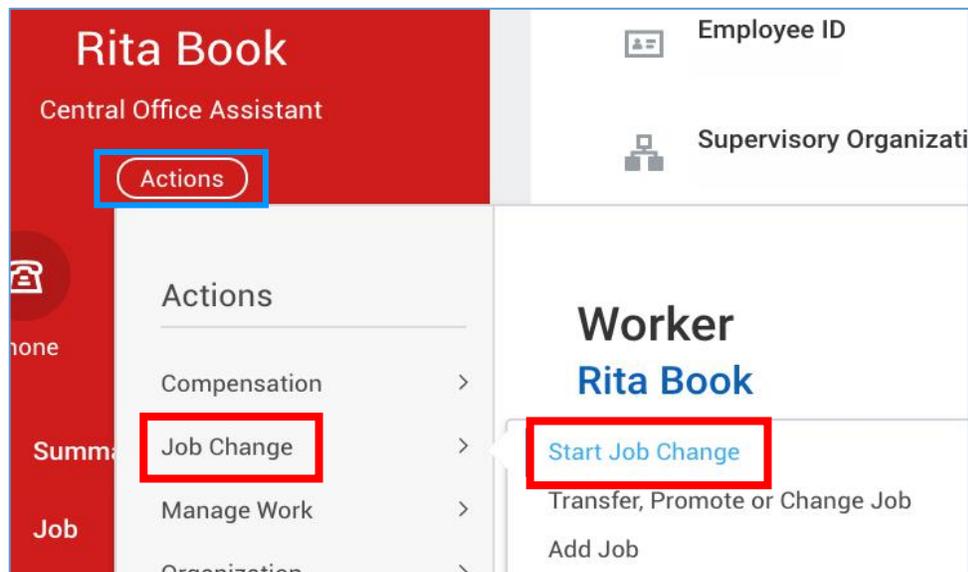
2) Fill in the blank prompts.
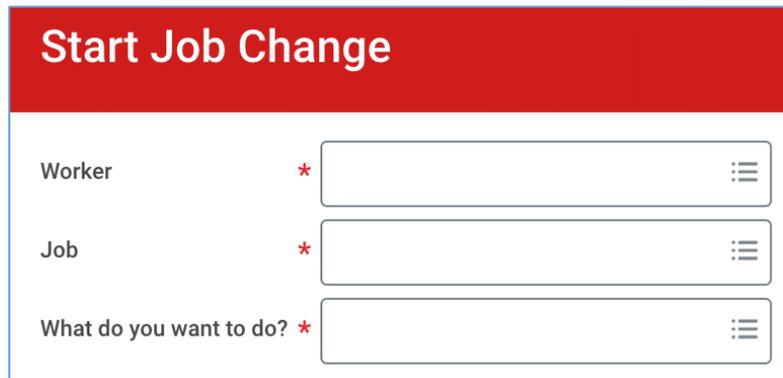
Start Job Change

Worker	*	
Job	*	
What do you want to do?	*	

Worker: If it is not already populated, search for and select the worker/employee.

Job: If not already populated, select the job/position you want to change.

What do you want to do?: Select the type of job change you want to initiate.

Start Job Change Options

1. Move the worker to another supervisory organization that I support (p.4)
2. Change the Job Title/Business Title for the job/position (p.5)
3. Extend the job/position end date (p.6)
4. End the job/position early (p.8)
5. Change the organization assignment AND costing allocation for the job/position (p.9)
6. Make multiple changes to the job/position (p.12)

Move the worker to another supervisory organization that I support

NOTE: You can only move a job/position to another supervisory organization that you also support. This means you have to be the Manager or the Administrative Assistant of the new supervisory organization.

If you also need to change the organization assignments as part of this move then you should cancel and select the **Make multiple changes to the job/position** reason instead.

1. Choose the new supervisory organization for the worker.

Start

Start Details

When do you want this change to take effect? *

08/29/2020

Why are you making this change? *
Lateral Transfer

Who will be the manager after this change?

× Jason Martinello ···

Which team will this person be on after this change?

× Payroll Operations
(Temporary) (Jason
Martinello (Inherited))

2. Click **Start** at the bottom of the page.
3. Change the effective date if needed.

Start

Start Details

When do you want this change to take effect? *

08/29/2020

Why are you making this change? *
Lateral Transfer

4. Click **Submit** at the bottom of the page.

Change the Job Title/Business Title for the job/position

1. Change effective date if needed.

Start

Start Details

When do you want this change to take effect? *
08/29/2020

Why are you making this change? *
Job Title Change

2. Click **Start** at the bottom of the page.
3. Scroll down to the section labelled **Job**.
4. Update the **Job Title**.

   *NOTE: Do <u>not</u> change the Job Profile.

Job

Job Profile

Job Profile *
Student Worker - UG

Job Title
Central Office Assistant

5. Click **Submit** at the bottom of the page.

Extend the job/position end date

1. Change effective date if needed.

Start

Start Details

When do you want this change to take effect? *
08/15/2020

Why are you making this change? *
End Date Extension

2. Click **Start** at the bottom of the page.
3. Scroll down to the section labelled **Administrative**.
4. Update the **End Employment Date.**

End Employment Date *

05/31/2021

5. Add any necessary attachments.

Attachments

Documents

Add

6. Enter any comments.

enter your comment

7. Click **Submit**.
8. (If applicable, this step may not always appear)

Open the costing allocation step.

Under Costing Allocation Level select **Worker and Position**.

If costing allocation details **do not** exist then you can click **Submit** at the bottom of the page after selecting **Worker and Position**.

NOTE: Costing allocation details should only be entered if the job/position is funded by a grant or gift OR the job/position is split funded (funded by more than one cost center). If the job/position does not fit these criteria then you will only select "Worker and Position" and you will not enter any costing allocation details.

If costing allocation details **do** exist then you may need to update the end date to match the new end employment date. You can also choose to leave the end date blank. Click **Submit** at the bottom of the page.

End the job/position early

1. Change effective date to today's date.

Start

Start Details

When do you want this change to take effect? *

08/29/2020

Why are you making this change? *

End Date Change (Ending Assignment Early)

2. Click **Start** at the bottom of the page.
3. Scroll down to the section labelled **Administrative**.
4. Update the **End Employment Date.**

End Employment Date *

05/31/2021

5. Enter the reason why the job/position is being ended early in the comment box at the bottom of the page.

enter your comment

6. Click **Submit** at the bottom of the page.

Change the organization assignment AND costing allocation for the job/position

NOTE: If you only need to make an organization assignment change then we suggest you just use the **Change Organization Assignment** process.

NOTE: If you only need to make a costing allocation detail change then use the **Assign Costing Allocation** process. Costing allocation details should only be entered if the job/position is funded by a grant or gift OR the job/position is split funded (funded by more than one cost center). If the job/position does not fit these criteria then you will only select "Worker and Position" and you will not enter any costing allocation details.

1. Change the effective date if needed.

Start

Start Details

When do you want this change to take effect? *

08/29/2020

Why are you making this change? *

Data Change

2. Click **Start** at the bottom of the page.
3. Scroll down to the section labelled **Organizations**.
4. Update the cost center. The additional worktags will update automatically.

Organizations

Cost Center

Cost Center *

CC10340 Residence Life

Costing

Program

N20 Auxiliary Operating Expenditures

Fund

F11 Auxiliary Fund

5. Click **Submit** at the bottom of the page.

6. Click **Open**.

Assign Costing Allocation for Change Job
Due Date   08/23/2020

Open

Under Costing Allocation Level select **Worker and Position**.

Include Existing Allocations

From   08/29/2020   To   MM/DD/YYYY   Refresh Costing Allocation Data

Costing Allocation Details

Costing Allocation Level *   select one

select one

Earning

Worker, Position, and Earning

Worker and Position

Add

If costing allocation details **do not** exist then you can click **Submit** at the bottom of the page after selecting **Worker and Position**.

*NOTE: Costing allocation details should only be entered if the job/position is funded by a grant or gift OR the job/position is split funded (funded by more than one cost center). If the job/position does not fit these criteria then you will only select "Worker and Position" and you will not enter any costing allocation details.

If costing allocation details **do** exist, you need to end the old one and add a new one. If you do not need to change the costing allocation details then you have initiated the wrong process. Cancel this process and initiate a Change Organization Assignment process instead.

a. Enter an end date to the existing costing allocation details. If an end date is already entered then you can change the end date or you can move on to the next step (b) to add the new costing allocation details.

Costing Allocation Details

Costing Allocation Level * | Worker and Position ▼

Earning | (empty)

Copy Costing Allocation ☐

Start Date * 07/01/2020 📅

End Date MM/DD/YYYY 📅

Copy Costing Allocation ☐

Start Date * 07/01/2020 📅

End Date MM/DD/YYYY 📅

> **Costing Allocation Attachments**

1 item

(+)	Order	Default (As of Start Date)	Required with no Default (Must have Costing Override)	*Cost Center	*Division	*Additional Worktags
(+)(−) ⩒ ▾				× CC10133 Biology ··· ☰	× D23 College of Science and Mathematics ··· ☰	× Fund: F20 Sponsored Awards Fund ☰ × Grant: GR00999 Test Grant × Program: N10 Instruction

b. Scroll down and click the **Add** button to add the new costing allocation details.

> Remove

> Add

c. Enter the **start date** of the new costing allocation details. The start date will be the day after the old costing allocation details end date.

d. Add your worktags. We suggest you enter the grant or gift worktag first (if applicable) because it will automatically pull in the related worktags.

*Cost Center	*Division	*Additional Worktags
☰	Search ☰	Search ☰

e. If the job/position is split funded you can click the plus sign button to the left to add another line.
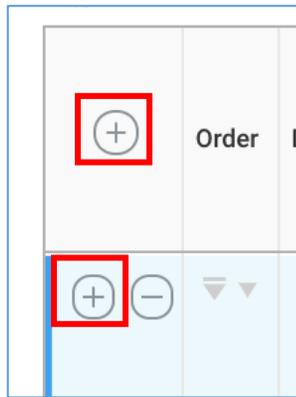
f. Click **Submit** at the bottom of the page.

Make multiple changes to the job/position

1. Change the effective date if needed.
   You can also move the position to another supervisory organization that you support by choosing the new supervisory organization under, "Which team will this person be on after this change?".

2. Click **Start** at the bottom of the page.

3. Scroll down to the section labelled **Job**. You can update the Job Title in this section.
   *NOTE: Do <u>not</u> change the Job Profile.**

Job

Job Profile

Job Profile *
Student Worker - UG

Job Title
Data Entry Assistant

Business Title

Business Title
Data Entry Assistant

4. Scroll down to the section labelled **Administrative**.

   You can update the **End Employment Date** in this section.

   End Employment Date *
   05/31/2021

5. Scroll down to the section labelled **Organizations**.
   You can change the default organizations for the position in this section.

Organizations

Cost Center

Cost Center *
CC10340 Residence Life

Costing

Program
N20 Auxiliary Operating Expenditures

Fund
F11 Auxiliary Fund

6. Scroll down to the section labelled **Attachments**.
   You can upload attachments related to the changes you are making to the position.
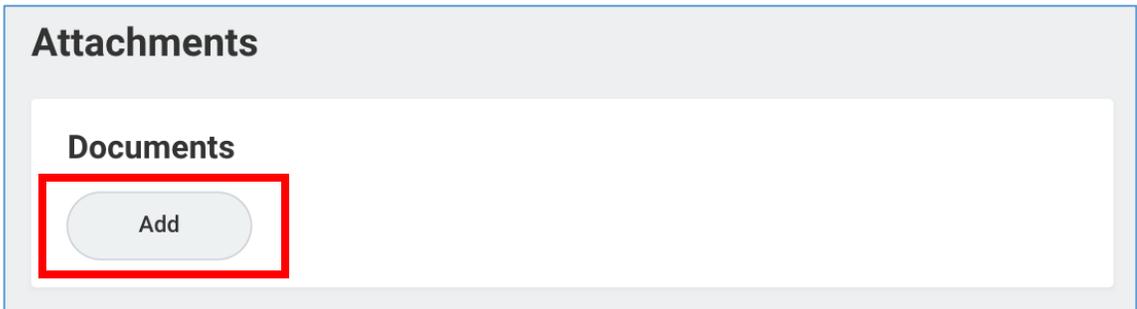
7. Scroll down to the section labelled **Compensation**.
   To change the hourly rate, you will click the edit pencil in the subsection labelled **Hourly**. You need to provide a justification in the comments at the bottom of the page if the hourly rate increase is greater than $1/hour.
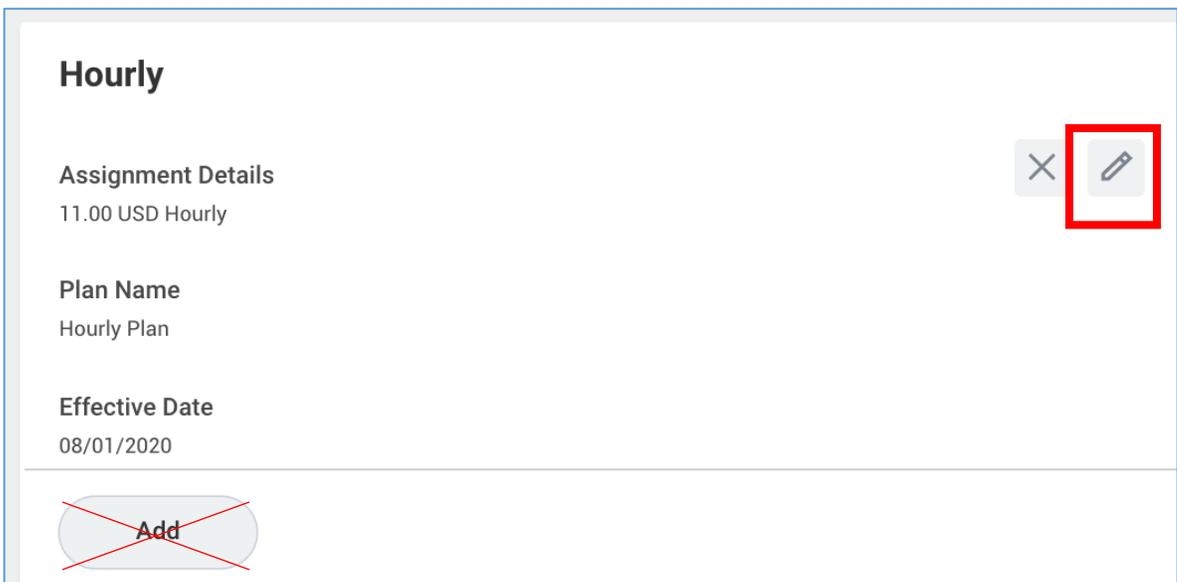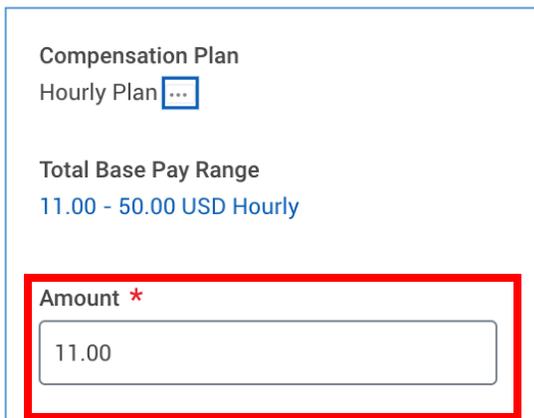

*NOTE: If you are increasing the hourly rate by more than $1/hour you need to provide a justification in the comments at the bottom of the page.

*NOTE: Do not edit any other area under the Compensation section and do not click the Add buttons.
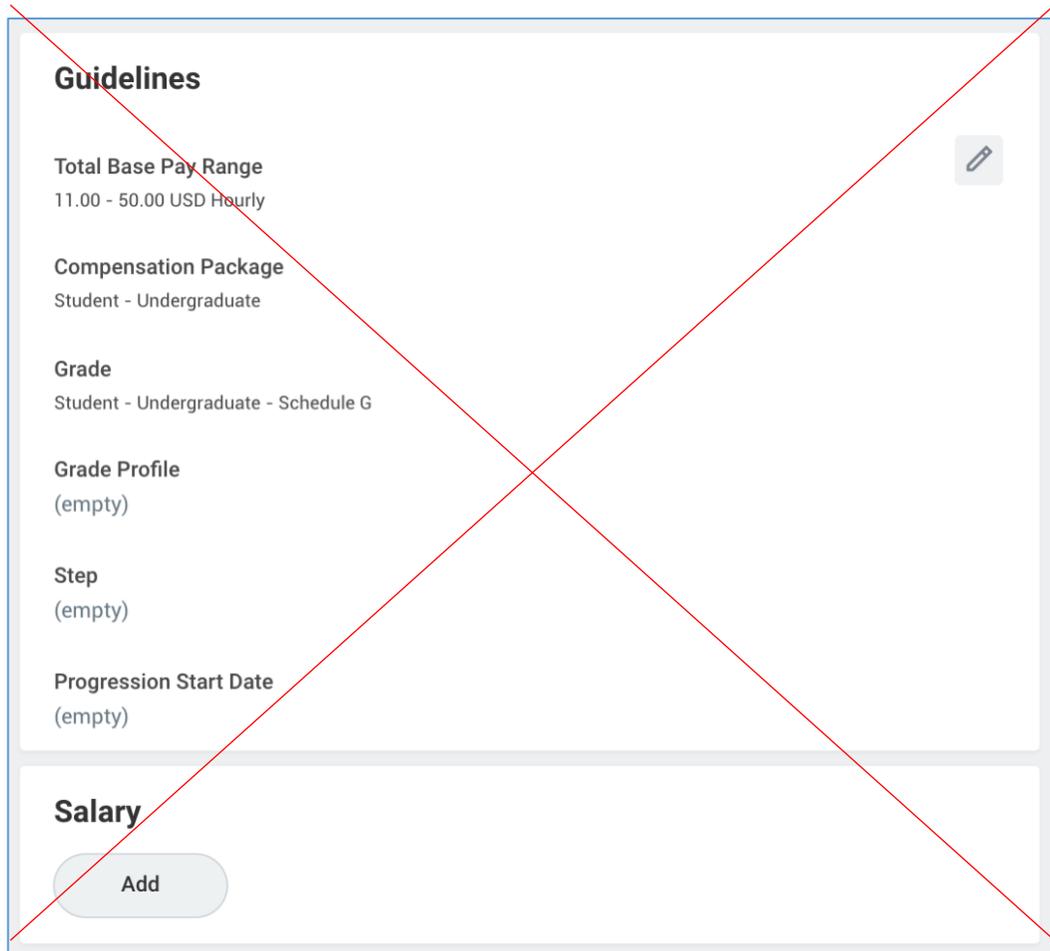

8. Click **Submit** at the bottom of the page.
9. (If applicable, this step may not always appear)

Open the costing allocation step.

Under Costing Allocation Level select **Worker and Position**.

If costing allocation details **do not** exist then you can click **Submit** at the bottom of the page after selecting **Worker and Position**.

NOTE: Costing allocation details should only be entered if the job/position is funded by a grant or gift OR the job/position is split funded (funded by more than one cost center). If the job/position does not fit these criteria then you will only select "Worker and Position" and you will not enter any costing allocation details.

If costing allocation details **do** exist then you may need to update the end date to match the new end employment date. You can also choose to leave the end date blank. Click **Submit** at the bottom of the page.

10. Click **Submit** at the bottom of the page.