

- **Create Position**
 - Please create positions first, then create the job requisition or move a person during change job.
 - When performing a change job that is a promotion, you will change the Job Profile, not the Position. For reclassifications/promotions, be sure to do the Edit Position Restrictions process first, then do the change job process.
 - Regardless of when a position is created, ALWAYS have some sort of default compensation (except for student workers). From a merit point of view, it should only be used on vacant positions in your reports and does not affect a worker's compensation at all. It is, however, used in other ways, so don't skip, cancel or avoid that step.

- **Edit Position Restrictions**
 - When using Edit Position Restrictions, you will be presented with a Default Compensation step. Do not skip, cancel, or avoid it. You don't have to change it (although you may want to), but you should complete and submit it normally.
 - Edit Position Restrictions changes the position and does not touch the employee at all. Nothing that is related to Edit Position Restrictions and the Default Compensation will affect a worker's job profile, compensation, or the merit process. You have to do a Change Job (can change job attributes such as a job profile as well as compensation) or Request Compensation Change (changes compensation but not job attributes) to actually affect what a person is being paid.

- **Change Job**
 - Change Job is the process for promotions, transfers, and other job changes. This is performed on a worker-position combination (e.g. not on the position only like the above).
 - Note: During the merit process:
 - If you are performing this AND the person will be included in the merit process to award merit, adjustments, and promotions, you will complete the compensation step by using the arrow to restore the salary or hourly plan, any allowances the person has, and the merit plan BUT MAKE NO CHANGES. After that, you will continue forward to complete the action. You are not skipping this step but just ensuring no changes are made to compensation prior to going forward.
 - Enter any compensation changes related to this job change into merit.

Change Job Reasons

Data Change:

- **Data Change> Hours or Work Period Change**
Used for changing scheduled weekly hours (FTE %) and/or Annual Work Period and Disbursement Plan Period (Annual Term), without other employee or position changes.
- **Data Change> Job Classification Change**
Used for changing position job classification overrides, i.e., when the job classification on a position differs from the job classification assigned to a job profile, without other employee or position changes. Job Classifications that can be overridden at the position level are only: Campus Security Designation; Hazard Duty Pay Eligible Flag; Longevity Eligible Flag; Overtime Eligibility Flag.
- **Data Change> Location Change**
Used for changing the Location (geographic city) of the job without any other employee or position changes.
- **Data Change> Position Reclassification**
Used for changing the job profile when the job duties of an employee's position are re-evaluated and the position is assigned a new job profile or a combination of other data changes, that do not result in being assigned to a lower or higher salary range and/or title. Best practice guideline is to complete Edit Position Restrictions on the position prior to initiating Change Job for the employee.
- **Data Change> Position Title Change**
Used for changing the position title, without changing the job profile, to better identify the work of the employee when using generic job profiles. May also be used to change title and job profile for student worker, graduate assistant and temporary/casual workers due to work study or grant funding requirements, or to specify a title for time sheet use, without a change in qualifications or rate of pay. Position Title Change should not be used for reclassification, promotion or demotion.

Demotion:

- **Demotion>Demotion New Position**
Used to move the employee from one position to another position having a lower pay range and/or less senior title, requiring less education, experience and responsibility. The position can be newly created or an existing position that would be new for the employee.
- **Demotion>Demotion Reclassification**
Used when the job duties of an employee's position are re-evaluated and the position is assigned to a new classification, i.e., job profile, having a lower pay range and/or less senior title, requiring less education, experience and responsibility. Best practice guideline is to complete Edit Position Restrictions on the position prior to initiating Change Job for the employee.

Promotion:

- **Promotion>Promotion New Position**
Used to move the employee from one position to another position requiring higher qualifications, a higher rate of pay and a title change. The position can be newly created or an existing position that would be new for the employee.
- **Promotion>Promotion Reclassification**
Used for when the job duties of an employee’s position are reevaluated and the position is assigned to a new job profile while remaining in the same position, requiring higher qualifications, a higher rate of pay and a title change. Best practice guideline is to complete Edit Position Restrictions on the position prior to initiating Change Job for the employee.

Transfer:

- **Transfer>Employee Transfer**
Used to move the employee from one position to another position both of which may be assigned the same salary range, title or organizational level within the same System Member or Company.
- **Transfer>Employee Transfer Interagency (NOT AN AVAILABLE VALUE YET)**
Used to move the employee from one position to another position both of which may be assigned the same salary range, title or organizational level to another System Member or Company.

Note: The Move Worker (Supervisory) business process is used to move the employee and position to another supervisory organization within the same System Member or Company and with no other changes.

Changing from Monthly paid to Hourly paid due to FLSA threshold

- Go to employee’s profile page – Click on actions button
- Choose Job Change – Transfer, Promote or Change Job
- Click on edit pencil
- When do you want this change to take effect? (Enter 1/1/2020 as effective date if due to new FLSA threshold – otherwise enter next available payroll date)
- Why are you making this change? Choose Data Change – Job Classification Change
- Click Start button
- Click Next button twice
- Under Details page in Job Classifications section click edit pencil and in Additional Job Classifications box type in Overtime then “Include in overtime”
- Under Administrative section click edit pencil and change Pay Rate Type from Salaried to Hourly
- Click Next button 3 times
- Under Compensation section, click ADD button under Hourly
- Enter “hourly” under compensation plan, change hourly amount to hourly rate (FTE salary divided by 2080)
- Scroll down to Merit Section and if it’s been X’ed out click the restore arrow
- Put in comments “changing from monthly to hourly due to FLSA”
- Click Next – review everything then click Submit button or Save for Later if needed
- Will route to Dept head then back to HR Contact for costing allocation which can be skipped if no changes
- Submit - will to go payroll to assign pay group then will be completed.

Helpful Hints

- **Costing Allocations**
 - When a position is filled there should ALWAYS be a Worker Position costing allocation entered. This can usually be copied from the Position Restrictions costing allocations during the Hire process (there's a checkbox to copy them).
 - Encumbrances are drawn from the Worker Position level costing allocations, so if they are missing, that can cause problems on the FAMIS side.
 - When payroll is completed and funds are being distributed, if an employee does not have Worker Position level costing allocations their payroll will be directed to the accounts on the Position Restrictions level costing allocation, but this is for the actual accounting distribution, not the encumbrances.
 - If the costing allocation is already correct for a particular level, the task can be skipped; however, it is critical to ensure the Worker Position level costing allocation is entered rather than relying on the Position level costing allocation.

- **Allowances** - In addition to the hourly or monthly salary rate, you can add an “Allowance” during the Hire BP or the Request Compensation Change BP which can be run at any time. Allowances are *always a monthly pay frequency*. This should never say Bi-weekly.

- **Longevity Pay for Faculty** – faculty job profiles default to no longevity pay. If a faculty member is not teaching and is eligible for longevity pay, the HR Contact must override the job profile classification to “Y - Yes (Longevity Eligible)”: Job Change => Data Change => Additional Job Classifications. When a faculty member’s funding changes to teaching funds, making them ineligible for longevity, the HR Contact must change the job profile classifications back to “N - No (Longevity Eligible)” or remove it altogether so the job profile default classification of no longevity will be in effect.

- **Job Changes** - Each time you make an adjustment to annual work period, scheduled weekly hours or rate, Workday will require you to “verify” the salary and click the check mark. **If you do not verify the rate the compensation will be changed to zero.** To correct, change compensation to reenter salary or “restore” the salary by clicking on the arrow. Also check that any allowances or merit that was removed is restored by clicking the arrow.

- **Default Compensation** – the Compensation assigned on a position. This is used for budgeting/encumbrances when a position is vacated.

- **Compensation or Worker Compensation** – the Compensation assigned to a Worker-Position combination. This is used for encumbrances when a position is filled.

Reports

- **Employee Academic Pay Settings by Organization** -report provides a listing of employees by organization including all their positions' academic pay settings, compensation plan assignments, annual base pay amounts, and pay group assignments with pay frequency.
- **Compensation Plan Allowance Assignments with Academic Pay Period – TAMUS** - report will be used by HR/Compensation/Payroll staff to identify academic pay periods to manage worker's allowance plans.
- **Current Worker Detail Report** – View compensation details for all workers with active status in one or more selected organizations that you manage or support. Enables you to verify compensation for your active workers. Details include information about the worker's job, compensation plans, and compensation ranges. You can optionally include information about managers or narrow report results to a specified date, custom organization, or organization role.
- **Employee Changes Worklet**

