Use this job aid to fill an open position.

- Page 2: Job Requisition and Post Job
- Page 13: Additional Actions — Job Requisition
- Page 24: Additional Actions — Post Job
- Page 31: Evergreen Requisition
- Page 41: Job Application Process  
  *(Reviewing and Choosing Candidates)*
- Page 70: Hire
- Page 108: Change Job

To learn more about Workday, find job aids and videos at the Workday Help website at [workday.trinity-health.org](http://workday.trinity-health.org).

For additional assistance, contact your Tier 1 resource, as noted on the Workday Help website at [workday.trinity-health.org](http://workday.trinity-health.org).
Job Requisition and Post Job
In Workday, a position is a chair, and a requisition is the permission to put a body in that chair. Chairs can be filled for new positions, editing positions (e.g., one FT to two PT) or refilling a vacating/vacated position. Note that creating a job requisition to refill a position does not change anything for the colleague currently in the position.

**Before You Start**

Ensure local policies and procedures have been followed and appropriate approvals have been received before making changes. This may include:

- An open job requisition exists in Workday (Manager initiates the create job requisition process)
- Manager works with Talent Acquisition, as necessary, to confirm need for requisition actions (e.g., changes, freeze/unfreeze, close)
- Manager works with Talent Acquisition as necessary to confirm job posting requirements (e.g., timing)

**Data Needed for Job Requisition and Post Job**

The following data will be required:

- **Job Posting Site**: Determine which job boards the job posting should be added to: Internal, Standard, Nursing, and/or sites posted using Broadbean

**Notes**

- Managers are responsible for creating job requisitions, coordinating with Talent Acquisition for follow up actions and reviewing candidates.
- Evergreen requisitions (e.g., for sourcing a pool of candidates) will be initiated by Talent Acquisition. See Evergreen Requisition on page 31 for detailed steps.

**Related Reports**

- View Open Positions
- Open Position Summary
- Headcount & Open Position Analysis
- Critical Open Positions

**Description**

This section shows the Talent Acquisition steps in creating a requisition, posting a job and how to take actions on existing job requisitions and job postings.

**SPECIAL NOTE:** While adding comments where indicated may be helpful for the process, please note that comments are auditable and therefore should be appropriate for the section.
Business Process Steps and Roles

Process roles are designated by “security role,” which do not reflect actual job titles. People may have multiple roles.

Create Job Requisition

Managers are responsible for initiating a job requisition. However, managers should coordinate with Talent Acquisition to discuss the requisition, the posting(s), and ongoing candidate activities.

- Initiate Create Job Requisition: Manager
- Review1: Manager’s Manager
- Review2: Primary Recruiter
- Approve: Labor Resource Approver
- Post Job: Recruiter

Additional Actions You Can Take

Job Requisitions

See page 14 for the initial steps to take before starting an action on a job requisition, including:
- Page 15: Edit Job Requisition
- Page 18: View Job Requisition Change History
- Page 19: Manage Job Requisition Freeze (freeze or unfreeze)
- Page 21: Close Job Requisition

Job Postings

See pages 25-26 for the initial steps to take before starting an action on a job posting, including:
- Page 27: View Job Posting Details
- Page 28: Update Job Posting
- Page 29: Unpost Job
- Page 30: Add Job Posting(s)

NOTE: This job aid only shows steps for the Primary Recruiter.
Process Steps

1. Log in to Workday
2. Click Inbox
3. Find the Job Requisition task and click to open (opens in the right pane of the screen)

Which role(s) can do this step?
• Primary Recruiter

NOTE:
This job aid picks up at the Review2 step. For details on the Initiate step, see the Manager job aid: Recruiting Process.
Process Steps (continued)

4. Review the job requisition request; click Approve or Send Back with instructions

5. Process moves on; click Done

IMPORTANT!
Be sure to validate hours, job description, and questionnaires.

NOTE: If compensation assigned is outside of the job profile’s range, an “error” will appear when you click Approve. This is a caution notice. You may adjust (after conversations with the Manager/Manager’s Manager) or click Approve again to accept the compensation as it is.

NEXT STEPS:
• Labor Resource Approver approves.
• Process returns to you to Post Job. See next page for instructions.
Process Steps

Which role(s) can do this step?
• Primary Recruiter

1. Log in to Workday

2. Click Inbox

3. Find the Post Job task and click to open
   (opens in the right pane of the screen)
Process Steps (continued)

4. Enter the information for one job posting

5. Click the add icon to add another posting site; repeat for each additional site

6. Type comments and click Submit

7. Process continues; click To Do

Job Posting Site
Choose from the list (see options below)

Job Posting Start Date
Auto-populates based on date provided for Recruiting Start Date during the Initiate process step; current date is immediate

Job Posting End Date
Enter if there is a set end date for the posting; this can also be added/updated at a later time

Primary Posting
Not required; only Broadbean, Nursing, Provider Career Site, and Standard may be marked as primary

NOTES:
• External candidates will not be able to access an internal (Workday) link.
• Post and unpost actions are immediate.

IMPORTANT!
Workday will not post to external job boards except through Broadbean. Broadbean allows you to post to multiple external job boards at one time, including more options than available from this menu (e.g., university sites).
**Process Steps (continued)**

8. Click **Broadbean Posting Center**

9. On the Broadbean site, click the box next to every job board you want to post to OR click the box next to All Sites Below to post to all

**NOTES:**
- You must create the external job postings on Broadbean from this link. If you go past this screen, you will need to Post Job to Broadbean again to access the link.
- Link opens a new window and takes you to the Broadbean website.
- You must be set up as a user to access the Broadbean website.

**NOTE:** The job boards you see will be based on your user access. You may see more job boards than shown here.
Process Steps (continued)

10. Type the details to go in the job posting
   (* indicates required information)

   NOTE: The following job requisition data is mapped to Broadbean:
   • Job Reference Number
   • Job Title
   • Job Location
   • Job Description
   • Apply Online URL

SCREEN CONTINUES IN NEXT COLUMN

11. Click Continue
Process Steps (continued)

12. Review the job posting and click **Send Advert**

13. When done, return to the Workday window, type any comments, and click **Submit**

14. Process is complete; click **Done**
**End of Process: Next Steps**

**WHEN POST JOB PROCESS IS COMPLETE (as applicable):**

- **Create Prospect:** Add candidate information in Workday.
- **Invite to Apply:** Allows recruiter to send job posting link(s) to prospect.
- **Create Job Application:** Add candidate information for a specific job opening.
- When candidates apply to open job postings, the Primary Recruiter will receive tasks in the Workday Inbox, which will kick off the job application process.

©2017 Trinity Health - Livonia, MI
Additional Actions for Job Requisition and Post Job
Additional Actions You Can Take—Job Requisitions

Start here to take actions on a job requisition.

1. Log in to Workday
2. Click Recruiting
3. There are two ways to access a job requisition to take additional actions:
   
   **A. RECENT**
   
   If your job requisition is recent, it may show up under Recent. Click the **job requisition** to move forward.

   4. Then follow the steps for the action to complete:
      
      • **Page 15:** Edit Job Requisition
      • **Page 18:** View Job Requisition
      • **Page 19:** Manage Job Requisition
      • **Page 21:** Close Job Requisition

   **B. VIEW**
   
   • Click My Open Job Requisitions
   • Click OK
   • Click the link to the job requisition you want to open

©2017 Trinity Health - Livonia, MI
EDIT JOB REQUISITION

Use when you need to make changes to an existing job requisition. Start with the instructions on page 14 to get to the point of step 1 below.

1. Click the related actions icon ("brick") next to your existing job requisition

2. Go to Job Change and click Edit Job Requisition

NOTE: You will receive an Unpost Job task in your Workday inbox to approve before you can post the edited job requisition (see step 6).

NOTES:
- Edit Job Requisition process takes about 3 to 5 minutes.
- There are three situations that will require you to close the requisition and ask the Manager to create a new one:
  – If the change is such that it requires new approvals (e.g., compensation).
  – If you need to change the questionnaire(s) AND a candidate has already applied to the requisition.
  – If you need to change the number of openings.
3. You will walk through the job requisition screens (* indicates required information)
   • Click the edit icon to make changes
   • Click Next to move through the screens
   • Type comments and click Submit when complete

4. Click Edit Additional Data or click Skip to skip this step (comment is required to skip)

   **NOTE:** A reason for the update is required (see options from list below).

   - Update Hiring Requirements
   - Update Job Title, Description or Justification
   - Update Qualifications
   - Update Recruiting Start Date
   - Update Target Hire Date

5. Process continues; click Open or click Skip to skip this step (comment is required to skip)

**NOTE:** If someone other than the Primary Recruiter initiates the Edit, a review step will be added after step 4 (to Primary Recruiter).
EDIT JOB REQUISITION (continued)

6. Process continues; click **Open**

7. All job postings will be unposted; type comments and click **Submit**

8. Process continues; click **Open**

**NEXT STEPS:** Go to page 8, beginning at step 4, for detailed instructions on posting jobs.
VIEW JOB REQUISITION CHANGE HISTORY

Use to view all changes that have been made to a job requisition. Start with the instructions on page 14 to get to the point of step 1 below.

1. Click the related actions icon ("brick") next to your existing job requisition

   ![Related Actions Icon]

   Click to view the details of the job requisition

   Click to view the details of the job requisition

   Notes: You can only view change history if a change has been made to the job requisition.

2. Go to Job Change and click View Job Requisition Change History

   ![View Job Requisition Change History]

   Notes: This only appears as a menu item if a change has been made to the job requisition.

3. Click the Job Requisition Event to see the history and any open or skip items

   ![Job Requisition Change History]

   Shows current and prior values
MANAGE JOB REQUISITION FREEZE

Use to freeze or unfreeze (hold/unhold) a job requisition. Start with the instructions on page 14 to get to the point of step 1 below.

1. Click the related actions icon (“brick”) next to your existing job requisition

2. Go to Job Change and click Manage Job Requisition Freeze

3. Complete the Manage Job Requisition Freeze form (* indicates required information)

   **IMPORTANT!** Click the box for Frozen when you’re freezing the job requisition. Clear the box when you’re unfreezing the job requisition.

   **FREEZE**
   - Hold on recruiting
   - Hiring manager not engaged
   - Position need being reviewed
   - Hiring freeze

   **UNFREEZE**
   - Hold removed
   - Hiring manager ready to move forward
   - Review complete
   - Hiring freeze removed
MANAGE JOB REQUISITION FREEZE (continued)

4. Type comments and click Submit

5. If freezing the job requisition:
   You can unpost the job — click Open to unpost the job or click Skip to leave the job postings

   OR

   If unfreezing the job requisition:
   You can repost the job — click Open to post the job or click Skip to leave the current job postings (if applicable)

6. Type comments and click Submit

7. Process is complete; click Done (not shown)

NEXT STEPS: Go to page 8, beginning at step 4, for detailed instructions on posting jobs. See page 25 for additional actions you can take on a job posting.
CLOSE JOB REQUISITION

Use to close (cancel) a job requisition. Start with the instructions on page 14 to get to the point of step 1 below.

1. Click the related actions icon (“brick”) next to your existing job requisition

2. Go to Job Change and click Close Job Requisition

3. Complete the Close Job Requisition form (* indicates required information)

NOTE: Once you close a job requisition, you cannot reopen it. You can, however, use the related actions icon (“brick”) to copy the job requisition in order to create it again.

• Position no longer planned to be filled at this time
• New requisition submitted — pay grade/job description changed
• Budgetary change
CLOSE JOB REQUISITION (continued)

4. Type comments and click Submit

   **NOTE:** Comment could document why you are closing the job requisition.

5. Process continues; click To Do

6. Read Instructions and act

7. Type comments and click Submit
CLOSE JOB REQUISITION (continued)

8. Process continues; click Open

9. Jobs postings will be removed; type comments and click Submit

10. Process is complete; click Done
Additional Actions for Post Job
Additional Actions You Can Take — Job Postings

Start here to take actions on your job posting.

1. Log in to Workday
2. Click Recruiting

3. There are two ways to access a job requisition to take additional posting actions:
   
   **A. RECENT**
   
   If your job requisition is recent, it may show up under Recent. Click the job requisition to move forward.

   **B. VIEW**
   
   - Click My Open Job Requisitions
   - Choose your role and click OK
   - Click the link to the job requisition you want to open
Additional Actions You Can Take — Job Postings

Continued from previous page.

4. Click **Job Postings** in your existing job requisition

Then follow the steps for the **ACTION** you wish to complete:

- **Page 27:** View Job Posting Details
- **Page 28:** Update Job Posting
- **Page 29:** Unpost Job
- **Page 30:** Add Job Posting(s)
TA: Post Job — Additional Actions

VIEW JOB POSTING DETAILS

Use to view the job posting details. Start with the instructions on pages 25–26 to get to the point of step 1 below.

1. Click Actions next to the job posting you want to view

2. Click View Job Posting Details (job posting shows in window)
UPDATE JOB POSTING

Use to change the job posting end date. Start with the instructions on pages 25–26 to get to the point of step 1 below.

1. Click **Actions** next to the job posting you want to view and click **Update Job Posting**

   - **Internal**
     - **Posting Start Date:** 11/04/2016
     - **Posting End Date:** 0
   - **External Careers**
     - **Posting Start Date:** 11/04/2016
     - **Posting End Date:** Yes
     - **Posting Cost:** 0
   - **Broadbean**
     - **Posting Start Date:** 11/04/2016
     - **Posting End Date:** 0

2. Choose **End Date** and click **Submit**

3. Process is complete; click **Done**

**NOTES:**
- You can only change the End Date on a job posting.
- If you have multiple job posts, you must open each job posting individually to update them.
TA: Post Job — Additional Actions

**UNPOST JOB**

Use to unpost a job. Start with the instructions on pages 25–26 to get to the point of step 1 below.

1. Click **Actions** next to the job posting you want to view and click **Unpost Job**

   ![](image1.png)

2. Type **comments** and click **Submit** *(Job Posting End Date will be the current date)*

3. Process is complete; click **Done**

   ![](image2.png)

**NOTE:** If you have multiple job posts, you must open each job posting individually to unpost them.
ADD JOB POSTING(S)

Use to add an additional posting(s) for a job. Start with the instructions on pages 25–26 to get to the point of step 1 below.

1. Click **Post Job**

2. The Post Job process begins; go to page 8 and continue from step 4
Evergreen Requisition
An evergreen requisition allows Recruiting to post jobs for a position that may or may not be open currently.

Examples for use:

• Source a pool of candidates for a position(s) that is constantly needing to be filled (e.g., nurse)
• Source for a large hiring circumstance (e.g., new hospital opening)
• Provide one campaign/campus event – one link to apply

A candidate may be moved from the evergreen requisition to a specific open job requisition as one becomes available and is considered appropriate.

**Before You Start**

Ensure local policies and procedures have been followed and appropriate approvals have been received before making changes.

**Description**

This section shows the steps to create an evergreen requisition and how to take actions on existing evergreen job requisitions.

**When to Use**

Use this job aid to support the evergreen requisition process. For instructions and details to edit or close an evergreen requisition, see the sections of this job aid starting on pages 13 and 24.

**NOTES:**

• Evergreen job requisitions are **NOT** connected to specific open positions.
• It is recommended you not leave evergreen requisitions open for more than six months. You may copy the evergreen requisition and then close the old one in order to “refresh” the requisition and postings.

**Related Reports**

• Open Positions
• My Candidates
• Find Candidates

**SPECIAL NOTE:**

You can also Copy Evergreen Requisition from the Job Change menu. This may be helpful if you want to refresh the evergreen requisition (e.g., if it is old). Copy the evergreen requisition as a starting place to create a fresh one, and then close the original.
**Business Process Steps and Roles**

Process roles are designated by “security role,” which do not reflect actual job titles. **People may have multiple roles.**

### Create Evergreen Requisition

Managers are responsible for initiating a job requisition. However, managers should coordinate with you (the Recruiter) to discuss the requisition, the posting(s), and ongoing candidate activities.

- **Initiate Evergreen Requisition:** Recruiter
- **Post Job:** Recruiter

### Additional Actions You Can Take

You can take the following actions on an existing evergreen requisition. The steps are identical to Job Requisition Actions; however, they will say “Evergreen Requisition.” See page 14 for the initial steps to take before starting an action on an evergreen requisition, including:

- **Page 15:** Edit Evergreen Requisition
- **Page 18:** View Evergreen Requisition Change History
- **Page 21:** Close Evergreen Requisition
**TA: Evergreen Requisition**

**Process Steps**

1. Log in to Workday

2. Type `create evergreen requisition` in the search box and press Enter

3. Click **Create Evergreen Requisition**

4. Start the Create Evergreen Requisition screen (*indicates required information)*

5. Click **OK**

**Which role(s) can do this step?**
- Recruiter

**Supervisory Organization**
Not required for an evergreen requisition

**Worker Type**
Choose employee or non-employee (formerly called POI)
Process Steps (continued)

6. Click the edit icon to complete the Recruiting Information screen (* indicates required information)

7. Click Next
8. Click the **edit icon** to complete/update Job screen (*indicates required information)

9. Click **Next**

**Process Steps (continued)**

**WHAT IS THIS?**

**Job Posting Title**
Create job posting title to reflect what you want the job posting to say (can be more than just title; marketing)

**Job Description boxes**
Add or review the job descriptions to show on the job posting

**Job Profile/Additional Job Profiles**
Official name of job for compensation purposes; drives Default Compensation (equivalent to current "job code")

**Worker Sub-Type**
Choose from:
- Casual/Contingent (Seasonal)
- Intern (Trainee)
- Regular
- Temporary (Fixed Term)

**Time Type**
Choose full-time or part-time (choose part-time for "casual" positions)

**Primary Location**
Location where the position resides

**Primary Job Posting Location**
Location to list in the job posting (e.g., Livonia instead of a specific Livonia facility)

**Additional Locations/Job Posting Locations**
Additional locations where the position may resides/post

**Scheduled Weekly Hours**
Calculates FTE

**Work Shift**
The shift to be worked by the colleague; choose from menu options (NOTE: Values are new for the Workday system)

**NOTE:** Additional Job Profiles may be useful to fill similar roles (e.g., ER nurse vs. ortho nurse).

**FUTURE ENHANCEMENT:**
Additional questionnaires for specific positions will be added at a later time.
10. Click the **edit icon** or **Add** to complete/update each section of the Qualifications screen (* indicates required information)

**Education**
- Degree(s) preferred or required

**Language**
- Language(s) preferred or required

**Certifications**
- Certification(s) preferred or required

**Skills**
- Skill(s) preferred or required (choose from menu options)

**Responsibilities**
- Will be used for performance management; options are not job specific

**Training Details**
- Training(s) completed that are preferred or required

**Notes:**
- You may add more than one qualification for each. Complete one, then click **Add** to add another.
- Qualifications can drive analytics, which will allow for greater talent management in the future.
12. Click the edit icon to complete/update each section of the Organizations screen (* indicates required information)

13. Click Next

Cost Center
Department or business unit used to track expenses and is responsible for the cost

Religious Order
Employment agreement used to capture affiliation with the religious order (for specific set of colleagues)

HR Company
Code assigned to HR department; ties to Health Ministry

Financial Organization
Business Unit or Process Level; ties to Health Ministry

Absence Group Exceptions
Sick/Illness, PTO, and other leave groups; choose from options if applicable

Pay Rule
Important for timekeeping system; code that determine this colleague’s timekeeping rules

FUTURE ENHANCEMENT: All positions will eventually have this information added. Please complete as noted below if not auto-populated.
Process Steps (continued)

14. Click **Add** to add any attachments (*indicates required information*)

   - Attachments
   - Documents
   - Add
   - Next

   **HINT:** Attachments could include things such as an overview of why requesting position, the job requisition form, etc.

   - Click the checkmark icon to accept changes

15. Click **Next**

16. Click **Add** to assign the Primary Recruiter

   - Assign Roles
   - Role
   - Assigned To
   - Next

   **Click the checkmark icon to accept changes**

17. Click **Next**
18. Review the summary screen; to return to a section, click **Guide Me** next to that section.

19. Click **Submit**.

20. Process continues; click **Open**.

**NEXT STEP:**
Process moves to Post Job. See page 8 for detailed steps and information.
Job Application Process
(Reviewing and Choosing Candidates)
The process of reviewing and choosing candidates (Job Application) is a dynamic process. This means the steps below do not have to be followed in order. Steps can be skipped or followed in a different order based on the individual circumstances.

This section of the job aid describes how each step of the candidate review and choosing is performed within the Workday system.

<table>
<thead>
<tr>
<th>Step</th>
<th>Process Roles</th>
<th>See page...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review</td>
<td>Primary Recruiter</td>
<td>43</td>
</tr>
<tr>
<td>Screening</td>
<td>Manager; Primary Recruiter</td>
<td>46</td>
</tr>
<tr>
<td>Assessment</td>
<td>Primary Recruiter</td>
<td>48</td>
</tr>
<tr>
<td>Interview</td>
<td>Manager; Primary Recruiter</td>
<td>52</td>
</tr>
<tr>
<td>Reference Check</td>
<td>Primary Recruiter</td>
<td>56</td>
</tr>
<tr>
<td>Offer</td>
<td>Primary Recruiter</td>
<td>59</td>
</tr>
<tr>
<td>Background Check</td>
<td>Primary Recruiter; Recruiting Coordinator</td>
<td>66</td>
</tr>
<tr>
<td>Hire</td>
<td>Primary Recruiter</td>
<td>68</td>
</tr>
</tbody>
</table>

**SPECIAL NOTE:**
While adding comments where indicated may be helpful for the process, please note that comments are auditable and therefore should be appropriate for the section.
**Process Steps**

1. Log in to Workday
2. Click Recruiting
3. There are two ways to access a job requisition:
   
   **A. VIEW**
   - Click My Open Job Requisitions
   - Choose your role and click OK
   - Click the link to the job requisition you want to open

   **B. RECENT**
   - If your job requisition is recent, it may show up under Recent. Click the job requisition to move forward.
Process Steps (continued)

4. Click Review Candidates
Process Steps (continued)

5. Check the box next to each candidate you want to take action on

6. Click Move Forward or choose another option from the More menu

7. Click the prompt icon to choose the stage for the selected candidate(s)

8. Click OK (process moves to the step you select)

NOTE: A questionnaire will not move with a candidate if you move the candidate to another requisition.
**Process Steps**

1. Log in to Workday
2. Click **Inbox**
3. Find the Manager Screening task and click to open (opens in the right pane of the screen)
4. Contact the candidate to schedule and conduct a phone screening (see instructions in yellow box)

**Which role(s) can do this step?**
- Manager
- Primary Recruiter

**To find candidate’s contact and other information:**
1. Click **Recruiting**
2. Click **My Candidates**
3. Click the related actions icon (“brick”) next to the candidate’s name
5. When screening is complete, click your feedback/direction choice

6. Click Submit

7. Process moves on; click Done

NOTE: If Manager selects one of the following options, it will forward to the Primary Recruiter for follow up:
- Reviewed – Further Information Needed
- Reviewed – Manager Scheduling Interview
- Reviewed – Recruiter to Schedule Interview
- None of the Above
Process Steps

1. Log in to Workday

2. Click **Inbox**

3. Find the Manager Screening task and click to open (opens in the right pane of the screen)
Process Steps (continued)

4. Click **Assessment** in the Move Forward menu

5. Click **Assess**

**HINT:** Click on any tab during the job application process to see the candidate’s application information.

**HINT:** If you click **Done** instead of **Assess**, you can access the task from your Workday Inbox.
6. Complete the Assess Candidate form (* indicates required information)

Click the add icon to add an assessment

- Healthcare Source HSA
- Healthcare Source HLA
- Hogan
- Prophecy
- ETS

TEST

- IBM Kenexa – Microsoft Office Excel
- IBM Kenexa – Microsoft Office PowerPoint
- IBM Kenexa – Microsoft Office Access
- IBM Kenexa – Microsoft Office Word

STATUS

- Pass
- Fail
- In-process
- Requires Review
- Re-assess
- Complete
7. Type **comments** and click **Submit**

8. Click **Assessment Decision**

9. Click your choice from the Move Forward or Decline menus *(process ends or moves to the step you select)*
Process Steps

Which role(s) can do this step?
- Manager
- Primary Recruiter

1. Log in to Workday
2. Click Inbox
3. Find the Interview task and click to open (opens in the right pane of the screen)
Process Steps (continued)

4. Add the interviewers and interview dates; click the **add icon** to add additional interviewers

5. Type **comments** for the interview team

6. Click **Submit**

7. Click **Done**

**NOTE:** Currently Workday does not integrate with your calendar. You will need to add interview appointments to your calendar separately.

**NOTE:** Use the arrows to change the order of the interviews.

Go to next page to see the steps to Rate Interview once the interview is complete.
Process Steps

After interview, Manager provides feedback and direction for the Recruiter.

1. Log in to Workday
2. Click **Inbox**
3. Find the Interview task and click to open
   (*opens in the right pane of the screen*)
**Process Steps (continued)**

4. Choose a rating

5. Type **comments** with direction for the Recruiter

6. Click **Submit**

7. Click **Done**

Recruiter continues the process, working with the Manager as needed.
**Process Steps**

1. Click **To Do**
   - **HINT:** If you click **Done** instead of **To Do,** you can access the task from your Workday Inbox.

2. Follow the Instructions provided
   - **NOTE:** The Reference Check step may not always appear in the Move Forward menu; follow the instructions on the Step 2 screen below (and detailed on the next page) to perform the task.

3. Click **Submit**

4. Click **Done**

**Which role(s) can do this step?**
- Primary Recruiter

**NOTE:** See next page for these step-by-step instructions. You can return to the To Do task from your Workday Inbox after you complete the instructions.
TO DO: CHOOSE SKILLSURVEY SURVEY ID

1. Click **Recruiting** on the Workday home page

2. Click **My Candidates – Primary Recruiter**

3. Click the link for the candidate

4. Click **Additional Data** under the Overview tab
TO DO: CHOOSE SKILLSURVEY SURVEY ID (continued)

5. Click **Edit**

6. Click the **prompt icon** to choose a survey

7. Click **OK**

8. Click **Done**
**Process Steps**

1. Log in to Workday

2. Click **Inbox**

3. Find the Interview task and click to open *(opens in the right pane of the screen)*

Which role(s) can do this step?
- Primary Recruiter
Process Steps (continued)

4. Click **Offer** from the Move Forward menu

5. Click **Open**

**HINT:** If you click **Done** instead of **Open**, you can access the task from your Workday Inbox.
**Process Steps (continued)**

6. Click the **edit icon** to change any information in the Start form.

7. Click **Next**
Process Steps (continued)

8. Click the **edit icon** to change any information in the Compensation form

Click the **checkmark icon** to accept changes

9. Click **Next**
**Process Steps (continued)**

10. Click the **edit icon** to change any information in the One-Time Payment form.

11. Click **Next**

12. Review the Summary Page; when ready, click **Submit**

---

**REASONS**
- Incidental Expenses
- One-Time Payment
- Relocation Expenses

**NOTE:** If Workday doesn’t allow you to enter an amount, you may need to return to the Compensation page and reselect TH Hourly Plan as the hourly compensation plan name.
**Process Steps (continued)**

13. Click **Complete Questionnaire**

![Image of Complete Questionnaire screen]

**HINT:** If you click **Done** instead of **Complete Questionnaire**, you can access the task from your Workday Inbox.

14. Complete the Questionnaire
   *(do NOT select “None of the Above” for any question)*

![Image of Completed Questionnaire screen]

**SCREEN CONTINUES IN NEXT COLUMN**

15. Click **Submit**
16. Click **Generate Document**

17. Click the double arrows to enlarge the screen; then review the offer letter and edit as appropriate *(do NOT select “None of the Above” for any question)*

18. Type comments and click **Submit**

19. Process moves to candidate to accept; click **Done**
**Process Steps**

1. Log in to Workday
2. Click **Inbox**
3. Find the Offer task and click to open *(opens in the right pane of the screen)*

---

**Which role(s) can do this step?**
- Primary Recruiter
- Recruiting Coordinator
**Process Steps (continued)**

4. Click **Background Check** from the Move Forward menu

5. Process moves to Recruiting Coordinator; click **Done**

- Click the prompt icon to choose the appropriate screening.
Process Steps

1. Log in to Workday
2. Click Inbox
3. Find the Offer task and click to open (opens in the right pane of the screen)

Which role(s) can do this step?
- Primary Recruiter

NOTE: If you are ready to start the Hire process before an Inbox notification is received, type hire employee in the search bar to start the process.
**Process Steps (continued)**

4. Click **Hire** from the Move Forward menu

5. Process continues; for support on the Hire process, see the Hire and Onboarding job aid beginning on page 70
Workday Job Aid

Talent Acquisition: Hire and Onboarding

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>This process is used once a candidate is chosen and has accepted the position (new hire/rehire). It enters the candidate into the Workday system as a new hire/rehire.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>When to Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use this process to add a new/returning colleague to Trinity Health in the Workday system in either:</td>
</tr>
<tr>
<td><strong>New Position:</strong> Fills a vacancy for a new position. An open position must be available before this process may be done.</td>
</tr>
<tr>
<td><strong>Existing Position:</strong> Fills a vacancy for an existing position.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HIRE vs. CHANGE JOB:</th>
</tr>
</thead>
<tbody>
<tr>
<td>If you “hire” an internal candidate at an RHM that is NOT using Workday: Use the Hire job aid.</td>
</tr>
<tr>
<td>If you “hire” an internal candidate at a Workday location (to an open position with a job requisition): After the colleague has accepted the offer letter, start from the “Ready for Hire” steps in the Hire job aid. Once those are complete, Workday will move you to this Change Job process.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Related Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Open Positions</td>
</tr>
<tr>
<td>Critical Open Positions</td>
</tr>
</tbody>
</table>
**Before You Start**

Ensure local policies and procedures have been followed and appropriate approvals have been received before adding a new hire. This may include:

- Manager works with Primary Recruiter in the interview and selection process
- Manager and Primary Recruiter determine salary offer in accordance with compensation guidelines
- Primary Recruiter extends the offer and receives acceptance from the candidate

**Description**

This section is used once a candidate is chosen and has accepted the position (new hire/rehire). It enters the candidate into the Workday system as a new hire/rehire.

**Notes**

**HIRE vs. CHANGE JOB:**

- If you “hire” an internal candidate at an RHM that is NOT using Workday: Use this Hire and Onboarding job aid.
- If you “hire” an internal candidate at a Workday location (to an open position with a job requisition): After the colleague has accepted the offer letter, start from the “Ready for Hire” steps in this Hire and Onboarding job aid (see page 72). Once those are complete, Workday will move you to this Change Job process.

**Related Reports**

- View Open Positions
- Critical Open Positions

**SPECIAL NOTE:**

While adding comments where indicated may be helpful for the process, please note that comments are auditable and therefore should be appropriate for the section.
Business Process Steps and Roles

Process roles are designated by “security role,” which do not reflect actual job titles. People may have multiple roles.

NOTE: Steps done outside of HR/TA are shaded in gray, and instructions for these steps are NOT included in this job aid.

Ready for Hire:
- **Initiate Hire**: Primary Recruiter
- **Verify Licenses and Certifications**: Primary Recruiter
- **Review Documents**: Candidate
- **Revise Employee Hire**: Primary Recruiter

Hire:
- **Change Organization Assignments**: Primary Recruiter
- **Assign Pay Group**: Payroll Partner/Lite
- **Assign Collective Agreement**: Primary Recruiter
- **Propose Compensation**: Primary Recruiter
- **Request One-Time Payment**: Primary Recruiter
- **Maintain Employee Contract**: Onboarding Representative
- **Pension Exclusion**: Primary Recruiter
- **Add Probation Period**: Onboarding Representative
- **Change Personal Information**: Onboarding Representative

CONTINUES IN NEXT COLUMN

NOTE: Steps done outside of HR/TA are shaded in gray, and instructions for these steps are NOT included in this job aid.

NOTE: Primary Recruiter below could also be the HRIS Person who initiated the Hire.

NOTE: Once the Change Organization Assignments step is complete, the new hire will have an employee ID number.
**Data Needed for Hire**

The following data will be required *(shown by step)*:  

- **Initiate Hire**
  - **Reason:** Menu options available

- **Add New Hire Information**
  - **Assign Collective Agreement** *(if applicable)*
    - **Collective Agreement:** Union agreement *(choose from menu options)*
  - **Maintain Employee Contract** *(if applicable)*
    - **Contract Start Date:** Date new hire will be active on employee contract *(hire date is most common)*
    - **Contract Type:** Choose from menu options
    - **Status:** Closed, open, or pending
  - **Add Probation Period** *(if applicable)*
    - **End Date:** Date probation period ends
  - **Edit Service Dates** *(if applicable)*
    - **Original Hire Date** *(if rehire)*
  - **Payroll Reporting Code** *(if applicable)*
    - **Payroll Reporting Code(s):** Code(s) based on the new hire’s physical work location
  - **Pension Exclusion** *(if applicable)*
    - **Reason:** Vow of Poverty or Sisters of Providence Surgeon – Contract Physician
**Process Steps**

Which role(s) can do this step?
- Primary Recruiter

1. Log in to Workday
2. Click Inbox
3. Find the Offer task and click to open (opens in the right pane of the screen)

**NOTE:** Process shown here begins after Offer Letter has been accepted by the candidate.

©2017 Trinity Health - Livonia, MI
Process Steps (continued)

4. Click Hire from the Move Forward menu

5. Process continues; click To Do
**Process Steps (continued)**

1. **Read Instructions and act; type comments**

   ![Verify Licenses and Certifications](image)

   **NOTE:** The background check will confirm the licenses and certifications. You confirm this step is complete here.

2. **Click Submit**
Process Steps (continued)

1. Process moves to Disposition Candidates

You have marked as Complete
Ready for Hire for Job Application: Roland Gunslinger - 00017096 Security Officer

Click on your inbox and Complete the To Do once that is complete you are ready to process the Hire

You have marked as Complete
Ready for Hire for Job Application: Roland Gunslinger - 00017096 Security Officer

Instructions:
- Please ensure that all remaining candidates have been properly dispositioned before completing this business process.
- To Disposition additional candidates, go to Regulation and select either the individual candidate or you can use the ‘Mass Action’ option.
- Go to Candidates tab, select the individuals you want to disposition or the box to select ‘All’, then select ‘Decline’ and the use the dropdown to select the reason. Then select ‘OK’.
Process Steps

1. Log in to Workday
2. Click Inbox
3. Find the Hire task and click to open (opens in the right pane of the screen)

Which role(s) can do this step?
• Primary Recruiter

NOTE: Hire email arrives after candidate completes document requests.
**Process Steps (continued)**

1. Complete the Revise Employee Hire form (*indicates required information*)

   - **Hire Employee:**
     - Acquisition/Merger
     - Hired from Non Workday Affiliate
     - New Hire
     - Resident
     - Residents – Day 1 Benefits
     - Residents – Oakland
     - Residents – Wilmington
     - Residents – Ann Arbor
     - Residents – Grand Rapids
     - Residents – Livonia

   - **Reason**
     - Procedural requirement; (see options above)

   - **Job Profile**
     - Auto-populates based on position chosen to be filled

   - **Time Type**
     - Auto-populates based on position chosen to be filled

   - **Location**
     - Auto-populates based on position chosen to be filled

   - **Employee Type**
     - Auto-populates based on position chosen to be filled

   - **Pay Rate Type**
     - Choose Hourly for all colleagues

   - **Hire Date**
     - The new hire’s start date

   - **Initiated From**
     - Job Application: Jamie Jones - 00000022 Staff RN MC ED TEST 11-20-16 on 11/28/2016

   - **Screen Instructions**
     - Continue on next page

   - **Revise Employee Hire**
     - ©2017 Trinity Health - Livonia, MI

   - **Procudural Requirements:**
     - Reason field is required
     - Choose Hourly for Pay Rate Type
**Process Steps (continued)**

2. Review Additional Information and make changes

<table>
<thead>
<tr>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Title</td>
</tr>
<tr>
<td>Business Title</td>
</tr>
<tr>
<td>Location Weekly Hours</td>
</tr>
<tr>
<td>Default Weekly Hours</td>
</tr>
<tr>
<td>Scheduled Weekly Hours</td>
</tr>
<tr>
<td>FTE</td>
</tr>
<tr>
<td>Job Exempt</td>
</tr>
<tr>
<td>Job Classifications</td>
</tr>
<tr>
<td>Job Classification</td>
</tr>
<tr>
<td>Company Insider Types</td>
</tr>
<tr>
<td>Workers’ Compensation Code from Job Profile</td>
</tr>
<tr>
<td>Workers’ Compensation Code Override</td>
</tr>
<tr>
<td>Work Shift</td>
</tr>
</tbody>
</table>

**PROCEDURAL REQUIREMENT:**
(differs from Workday system requirements)
- Scheduled Weekly Hours
- Job Classification
- Work Shift

**WHAT IS THIS?**

Click the prompt icons for options

**Job Title/Business Title**
Auto-populates based on position chosen to be filled

**Weekly Hours**
Only change Scheduled Weekly Hours, if necessary (or FTE will calculate incorrectly)

**Job Classification**
Add more, if necessary; classification for regulatory reporting and ensures correct benefits/PTO; choose from menu options

**Company Insider Types**
DO NOT USE

**Workers’ Compensation Code Override**
NOT USED AT THIS TIME

**Work Shift**
The shift to be worked by the colleague; choose from menu options

**SCREEN INSTRUCTIONS**
CONTINUE ON NEXT PAGE

To learn more about Job Classification and Work Shift options, go to the Workday Help website at [workday.trinity-health.org](http://workday.trinity-health.org).

©2017 Trinity Health - Livonia, MI

80
Process Steps (continued)

3. Review Additional Information and make changes (continued)

4. Click the add icon and Attach to add attachments (if applicable)

5. Type comments and click Submit

6. Process continues; click Open

First Day of Work
Auto-populates to match Hire Date

Time of Hire
DO NOT USE

Continuous Service Date
Auto-populates to match Hire Date; if rehire, add original Hire Date to bridge the continuity of service

Benefits Service Date
Tracks length of service for benefit programs; use Hire Date or Continuous Service Date (whichever is earlier)

Company Service Date
Tracks an additional service date, such as date of acquisition; use Hire Date or Continuous Service Date (whichever is earlier)

WHAT IS THIS?

First Day of Work
Auto-populates to match Hire Date

Time of Hire
DO NOT USE

Continuous Service Date
Auto-populates to match Hire Date; if rehire, add original Hire Date to bridge the continuity of service

Benefits Service Date
Tracks length of service for benefit programs; use Hire Date or Continuous Service Date (whichever is earlier)

Company Service Date
Tracks an additional service date, such as date of acquisition; use Hire Date or Continuous Service Date (whichever is earlier)

HINT: If you click Done instead of Open, you can access the next task from your Inbox.
Process Steps (continued)

Which role(s) can do this step? • Primary Recruiter

1. Scroll down, review the Organizations form; click the edit icon to make updates

WHAT IS THIS?

Company Name of Health Ministry

Cost Center The department or business unit used to track expenses and is responsible for the cost

Religious Order Employment agreement used to capture affiliation with the religious order (for specific set of colleagues)

HR Company Code assigned to HR department; ties to Health Ministry

Financial Organization Business Unit or Process Level; ties to Health Ministry

Absence Group Exceptions Sick/Illness, PTO, and other leave groups; choose from menu options

Pay Rule Important for timekeeping system; code that determine this colleague’s timekeeping rules

©2017 Trinity Health - Livonia, MI
2. Type comments and click Submit

3. Process continues; click Open
(or click Skip if no collective agreement)

NOTE: Once this step is complete, the new hire now has an employee ID number.
1. The next set of 14 tasks runs at the same time as Onboarding is completing their tasks.
   
   A. New hire completes onboarding, including:
      
      i. Review Documents (including RHM-specific documents, if applicable)
      ii. Complete Form I-9
      iii. Manage Personal Information
      iv. Change Emergency Contacts
      v. Disability Self-Identification
      vi. Veteran Status Identification
      vii. Add Payment Elections
      viii. Benefits Review Documents

2. The 14 tasks will be in the inboxes of the Primary Recruiter, License Certification Partner and Onboarding Representative at that same time to complete all at once. Then after those, and the Onboarding tasks by the colleague are completed, the Change Personal Information and Change Contact Information tasks will trigger for the Onboarding Rep to verify them.
Tasks that trigger simultaneously

Colleague Inbox

- Complete Form I-9
- Change Contact Information
- Veteran Status Identification
- Disability Self-Identification
- Change Emergency Contacts
- Review Documents
- Review Documents

Onboarding Rep Inbox

- Manage Probation Period: Roland Gunslinger (4208334)
- Service Dates Change: Roland Gunslinger (4208334)
- Pension Exclusion - If an Exclusion does not apply, click Skip to continue to next step.: 175403 SACA_Security_Officer_F1700 - Roland Gunslinger (4208334)
- Initiate Employee Health Information: Hire: Roland Gunslinger (4208334)
- One-Time Payment: Roland Gunslinger
- Propose Compensation Hire: Roland Gunslinger (4208334) - 175403 SACA_Security_Officer_F1700
- Update Licenses, Certifications and Education for Worker: Hire: Roland Gunslinger (4208334)
- Contract: Roland Gunslinger (4208334)
Note:

This is where the License and Certification Partner actually enters in the information for the Workers into Workday.
Process Steps (continued)

1. Once you have started the hire you will want to make sure that the Government ID has populated in Workday from the Candidate entry.

2. Click on the Edit Government IDs For Worker. This will open the actual task for you to pick the Worker and review their information. Type in their name or number and click ok.

NOTE: Verifying duplicate ID is VERY important. If you do not and there is another worker (or the same worker) in Workday this will cause payroll issues.
Process Steps (continued)

3. If the information is there, click Cancel, go back to your inbox and complete the task.

Which role(s) can do this step?
• Onboarding Representative
4. If the information is not there, click on the + sign under National IDs and type the information. Click **Submit** when you are done.
**Process Steps (continued)**

Which role(s) can do this step?
- Primary Recruiter

1. Click the **prompt icon** to choose from the Collective Agreements (*indicates required information*)

2. Type **comments** and click **Submit**

3. Process continues; click **Open**

To skip this step if not applicable:

1. From the email, click the **gear icon**
2. Click **Skip This Task**

*Note: You will be required to type a skip reason.*

To learn more about Collective Agreements and who is eligible, go to the Workday Help website at [workday.trinity-health.org](http://workday.trinity-health.org).

Based on your choice, you may also be asked to choose an **Area**; click the **prompt icon** for options.
Process Steps (continued)

Which role(s) can do this step?
• Primary Recruiter

1. Review the auto-populated information at the top of the form

- **Effective Date & Reason**
  Shows effective date entered during Initiate step

- **Primary Compensation Basis**
  Auto-populates based on information provided in this process; not an editable field

- **Guidelines**
  Compensation guidance/information based on Job Profile chosen during Initiate step

**IMPORTANT:** These fields cannot be updated from this screen.

SCREEN INSTRUCTIONS CONTINUE ON NEXT PAGE
Process Steps (continued)

2. Click the edit icon to update the compensation amount, if needed

- **Salary**
  - DO NOT USE
  - Use for all colleagues

- **Hourly**
  - Assignments Added
  - Plan Name: TH Hourly Plan added
  - Effective Date: 11/30/2016 added
  - Frequency
  - Hourly should be the only one used anything else will be incorrect when it comes time to pay the employee.

- **Allowance**
  - Auto-populates based on position; DO NOT MODIFY

- **Total Base Pay**
  - Range guideline of base pay auto-populated based on Job Profile

- **Amount**
  - Hourly pay amount within the Total Base Pay range

- **Currency**
  - DO NOT CHANGE from USD

- **Frequency**
  - Frequency of payroll; auto-populated based on Job Profile – Hourly should be the only one used anything else will be incorrect when it comes time to pay the employee.

**IMPORTANT:** Use Hourly for all colleagues

**NOTE:** You will receive a warning message if you type an amount above or below the Total Base Pay range. This warning will not stop you from proceeding.
Process Steps (continued)

3. Type **comments** and click **Submit**

4. Process continues; click **Open** or **To Do** based on what process appears next.
   *(or click **Skip** if not applicable)*
Process Steps (continued)

Which role(s) can do this step?
- Primary Recruiter

1. Review the Request One-Time Payment (OTP) form; click the edit icon to make changes (* indicates required information)

NOTE: This acts as a confirmation step.

Request One-Time Payment Jamie Jones
(4199755) 130 SO_ASSISTANT BUYER_1730

One-Time Payment Summary

Summary

Effective Date ★
11/30/2016

Reason
One-Time Payment > One-Time Payment

Total Amount Requested
500.00 USD

One-Time Payment

Payment Details
500.00 USD

One-Time Payment Plan
Bonus - Signing
Process Steps (continued)

2. Type **comments** and click **Submit**

3. Process continues; click **Open**
   (or click **Skip** if no employee contract)
1. Complete the Maintain Employee Contract form (* indicates required information)

**Contract ID**
Based on Health Ministry guidelines

**Contract Start Date**
Date contract will begin

**Contract End Date**
Date contract will end

**Contract Type**
Choose from menu options

**Status**
Choose closed, open, or pending

**Date Employee Signed**
Date colleague signed the contract

**Date Employer Signed**
Date employer representative signed the contract

**Contract Attachments**
Click **Create Worker Document** from menu options to go to an attachment screen

**Contract Description**
Based on Health Ministry guidelines

- Advanced Practice Professional – Employment Agreement
- Allied Health Professional
- BSN – Agreements
- Education Agreement
- Employee Loan Repayment
- Executive Contract – Employment Agreement
- External Liaison
- Housing Allowance Contracts
- Medical Director Contract
- Physician Contract – Employment Agreement
- Physician Loan Repayment
- Relocation Contract
- Retention Bonus Contract
- Scholarships
- Separation Agreement
- Sign-on Bonus Contracts
- Tuition Loan Agreements
- Vendor Contracts

**Which role(s) can do this step?**
- Primary Recruiter
2. Type comments and click Submit

3. Process moves to next step; click Done
Process Steps (continued)

Which role(s) can do this step?
- HR Representative
- HRSS Representative

1. Click the **prompt icon** to choose an exclusion reason

2. Type **comments** and click **Submit**

3. Process moves to next step; click **Done**

To skip this step if not applicable:

1. From the email, click the **gear icon**
2. Click **Skip This Task**

**Note:** You will be required to type a skip reason.

HINT: Click **Add Contract** on the event submitted screen to add more than one contract for a colleague.
Process Steps (continued)

Which role(s) can do this step?
• Onboarding Representative

1. Log in to Workday

2. Click **Inbox**

3. Find the Manage Probation task and click to open (opens in the right pane of the screen)
Process Steps (continued)

4. Update the Add Probation Period form (* indicates required information)

   - **Start Date**
     - Auto-populates to date of hire
   - **End Date**
     - End date of probation period; varies by RHM (e.g., 12 weeks for non-managers and 6 months for managers)
   - **Type**
     - Choose 30, 60, 90, 120, or 180 days from menu
   - **Reason**
     - Auto-populates with Introductory
   - **Extended End Date**
     - Could be used as a backup end date in case the hire/start date changes

   **NOTE:** Probation Period drives the Introductory Evaluation in Workday. If the colleague does not need one, you can skip the task.

5. Type comments and click Submit

6. Process continues; click Open

HINT: End Date will be required.
Process Steps (continued)

Which role(s) can do this step?
• Onboarding Representative

1. Add service dates, as applicable

   Original Hire Date
   Same as hire date unless a rehire, then date of first hire

   Continuous Service Date
   Date that will be used to bridge the continuity in service; defines length of service

   Benefits Service Date
   Tracks length of service for benefit programs

   Company Service Date
   Tracks an additional service date, such as date of acquisition

   Time Off Service Date
   Tracks time-off eligibility based on a different service date

   Seniority Date
   Auto-populates with Hire Date; tracks seniority based on a date other than Hire Date or Company Service Date

   Retirement Eligibility Date
   Tracks eligibility for retirement, such as when it is based on length of service or age

   Expected Retirement Date
   Reports on retirement for workers who announce their retirement date in advance

   Severance Date
   Tracks how long a worker receives severance pay

   Vesting Date
   Tracks when a worker is fully vested, when this differs from standard vesting rules

   WHAT IS THIS?

2. Type comments and click Submit

3. Process continues; click To Do (or click Skip)

To learn more about these dates and their implications, go to the Workday Help website at workday.trinity-health.org.
Process Steps (continued)

1. Click **Maintain Payroll Reporting Codes for Worker**
   - Effective Date: Enter the date of hire (first day of work)
   - Worker: Name of new hire

2. Complete the form

3. Click **OK**
Process Steps (continued)

4. Click the prompt icon to select the payroll reporting code for the new hire’s physical work location.

5. Type comments and click Submit.

6. Click Done to return to your Workday inbox.

HINT: Click the add icon to add more payroll reporting codes.

To learn more about the payroll reporting codes and which you should use, go to the Workday Help website at workday.trinity-health.org.
Process Steps (continued)

7. From the inbox message, click **Submit**

8. Process moves on; click **Done**
Process Steps (continued)

Which role(s) can do this step?
- Onboarding Representative

1. Log in to Workday
2. Click Inbox
3. Find the Local Employee Documentation task and click to open (opens in the right pane of the screen)
Process Steps (continued)

4. Read Instructions and act

5. Type comments and click **Submit**

6. Process moves to next step; click **Done**

**NOTE:** This acts as a reminder to actively gather locally required documentation, if needed.

To learn more about additional documentation for local government, go to the Workday Help website at [workday.trinity-health.org](http://workday.trinity-health.org).
Process Steps (continued)

1. Log in to Workday

2. Click Inbox

3. Find the **Initiate Employee Health Information** task and click to open (opens in the right pane of the screen)
Process Steps (continued)

4. Read Instructions and act

5. Type if the screen is complete or in process in the comments; click Submit

6. Process is complete; click Done

NOTE: This acts as a notice to initiate the employee health screen.
Process Steps (continued)

1. This step will trigger after the colleague has completed their onboarding tasks and you have completed all other tasks as well. Read the Instructions and act

   Complete To Do Change Contact Information

   15 hour(s) ago - Effective 06/07/2017
   For  175403 Security Officer-4
   Overall Process: Hire: Roland Gunslinger [4208134]
   Overall Status: Successfully Completed
   Due Date: 06/27/2017
   Instructions: Please enter in your complete mailing address including city, state, and zip code along with selecting a usage (such as Mailing and/or Street Address).

   Change Contact Information

2. Click on Change Contact Information, this will open the actual task for you to pick the Worker and review their information. Type in their name or number and click ok.
Process Steps (continued)

Which role(s) can do this step?
- Onboarding Representative

2. Verify the address is correct and contains Street Address, City, State, and Zip Code. If all are present you can go back to your inbox and submit the task. If anything needs to be corrected Click on Edit to correct.

3. Use the Pencil to correct missing or invalid information.

4. Click submit when done.

5. Go back to your inbox and submit the Change Personal Information Task.

NOTE: Address must contain all information for PCE and Payroll; Street Address, City, State and Zip.
Process Steps (continued)

1. Review Personal Information on the new colleague.
2. Click on the pencil to update anything that is missing or incorrect.
3. Click Submit

Which role(s) can do this step?
• Onboarding Representative

NOTE: There is a comments box that you can add to if needed before submitting the task.
End of Process: Next Steps

WHEN HIRE PROCESS IS COMPLETE

- For locations with CBAs, union steward should be notified of a hire.
- **INTEGRATION:** Identity Management automatically detects changes and updates the identity vault for identification, email account, etc.
Before You Start

Ensure local policies and procedures have been followed and appropriate approvals have been received before making changes. This may include:

- Manager/Recruiter needs to fill a position
- Manager identifies a need/opportunity for a job change and works with Recruiter, HR Partner, or HR Representative
  - Manager discusses change with colleague
  - Receiving manager approves change
- HR/Talent Acquisition completes any other necessary steps (e.g., create position, create job requisition, generate offer letter)
- Colleague accepts role/change and completes offer letter (if applicable)

Data Needed for Change Job

The following data will be required:

- **Worker**: Name of colleague for whom the change will occur
- **Job**: Job that will change if colleague has more than one job
- **Date of Change**: Will default to start of next pay period
- **Change**: Choose from menu options
- **Manager/Team**: Name of manager/supervisory org, if changing
- **Location**: Where colleague will move to, if changing
- **Position**: Open position, if changing
- **Compensation**: Confirm or update compensation rate
- **Other Details of Change**: May include: Company, HR Organization, Work Shift, etc.
**Business Process Steps and Roles**

Process roles are designated by “security role,” which do not reflect actual job titles. **People may have multiple roles.**

**NOTE:**
- Steps will vary based on the change being made. All steps may not be required.
- Steps done outside of HR/TA are shaded in gray, and instructions for these steps are NOT included in this job aid.

- **Initiate Change Job:** Recruiter, Manager, HR Partner, HR Representative, or HR Shared Services (HRSS) Representative
- **Change Activities** (table below):

<table>
<thead>
<tr>
<th>Step</th>
<th>Process Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Change Job</td>
<td>HR Partner or Recruiter</td>
</tr>
<tr>
<td>Review Organization Assignment</td>
<td>HR Partner, HR Representative, or Initiator</td>
</tr>
<tr>
<td>Assign Collective Agreement</td>
<td>HR Partner, HR Representative, or Initiator</td>
</tr>
<tr>
<td>Maintain Employee Contract</td>
<td>HR Partner, HR Representative, or Initiator</td>
</tr>
<tr>
<td>Review Compensation Change</td>
<td>Manager’s Manager</td>
</tr>
<tr>
<td>Request One-Time Payment</td>
<td>HR Partner, HR Representative, or Initiator</td>
</tr>
<tr>
<td>PTO Accrual Eligibility</td>
<td>Absence Partner Lite/Leave Partner</td>
</tr>
<tr>
<td>Validate Pay Group and Taxes</td>
<td>Payroll/Lite Partner</td>
</tr>
</tbody>
</table>

**SPECIAL NOTE:**
Generally, if a change involves a job requisition/posting, a Recruiter should initiate.

- **If you “hire” an internal candidate at a Workday location** (to an open position with a job requisition): After the colleague has accepted the offer letter, start from the “Ready for Hire” steps in the Hire and Onboarding job aid (see page 72). Once those are complete, Workday will move you to this Change Job process.
- **If you “hire” an internal candidate at an RHM that is NOT using Workday:** Use the Hire and Onboarding job aid (page 70).
TA: Change Job

**Process Steps**

1. Log in to Workday
2. Type *change job* in the search box and press **Enter**
3. Click **Change Job** from the search results

Which role(s) can do this step?
- Recruiter
- HR Partner
- HR/HRSS Representative
- Manager

If you “hire” an internal candidate at a Workday location (to an open position with a job requisition):

After the colleague has accepted the offer letter, start from the “Ready for Hire” steps in the Hire and Onboarding job aid (page 72). Once those are complete, Workday will move you to #7 of this Initiate Change Job step, and you will move forward from there.

Alternate Starting Steps:
1. Type the colleague’s name in the search box and press **Enter**
2. Click the related actions icon (“brick”)
3. Choose **Job Change**
4. Click **Transfer, Promote or Change Job**
5. Continue at step 6

©2017 Trinity Health - Livonia, MI
Process Steps (continued)

4. Type the **name of the colleague** for whom the change is happening

5. Click **OK**

6. Click the **edit icon** to complete the Change Job form

HINT: If the colleague has more than one job, you will also need to choose which job the change is for.
7. Complete the Change Job form (* indicates required information)

   - When do you want this change to take effect?
     Date for change; defaults to start of next pay period
   - Why are you making this change?
     Choose from menu options (see list below)
   - Who will be the manager after this change?
     If manager is changing, type new manager’s name here
   - Which team will this person be on after this change?
     If team is changing, type new supervisory org here
   - Where will this person be located after this change?
     If colleague is moving, new location where position will physically sit (Health Ministry plus location)

   **NOTE:** Changes default to start of the next pay period. To start at another date, enter date above and uncheck this box under Details.

8. Click **Start**

**JOB CHANGES**

- **Demotion – Decrease in Responsibility**
  - Benefit Ineligible
  - FT to PT
  - PT to FT
- **Promotion**
  - Career Ladder (Career Progression)
  - FT to PT
  - No Ben Change
  - Passed Boards
  - PT to FT
- **Hours Change**
  - Benefit Ineligible
  - FT to PT
  - Move to Per Diem
  - No Status Change
  - PT to FT
  - Per Diem to Part-time

**Others**

- Change Location
- Interim Assignment
- Interim Assignment End – No Longer Acting
- Job Reclassification
- Move to Another Manager (Reporting Relationship Change)
- Move to Another Manager in Another Company
- Move to Another Position on My Team
- Move from Employee to Non-Employee
- Transfer from RHM to RHM

**NOTE:** Some items may auto-populate based on the job requisition, if applicable.

©2017 Trinity Health - Livonia, MI
Process Steps (continued)

9. Click the **edit icon** to make all applicable updates based on the job change throughout this form *(see NOTE)/* indicates required information*

**NOTE:** There are three ways to move through this form:

1. **TOP DROPDOWN MENU**
   - Click the **arrow** for the menu of screens.
   - **HINT:** If your viewing screen is wide enough, this menu may show on the left side of the screen.

2. **FORWARD/BACK ARROWS**
   - Click the **forward** or **back arrow** to move through the screens.

3. **NEXT BUTTON**
   - Move through the screens by clicking **Next.**

To learn more about these screens, go to next page.
**Process Steps (continued)**

### ABOUT THE JOB CHANGE SCREENS

<table>
<thead>
<tr>
<th>Move</th>
<th>Job</th>
<th>Location</th>
<th>Details</th>
<th>Attachments</th>
<th>Organizations</th>
<th>Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong> (what you can change, as applicable)</td>
<td>Choose what you want to do with opening left on the team</td>
<td>Edit position, job profile, job title, and business title</td>
<td>Edit location, scheduled weekly hours, and work shift</td>
<td>Edit job classification, employee type, and time type</td>
<td>Upload attachments</td>
<td>Edit company, cost center, religious order, HR company, financial organization, absence group exception, and pay rule</td>
</tr>
<tr>
<td><strong>Special Notes</strong> Only appears if the job change includes a move (e.g., manager change, location change)</td>
<td>Choose the new position from this screen or click a box to create a new position</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>If the base pay change is 5% or more, the HR Leader will need to approve</td>
</tr>
</tbody>
</table>

**For More Information**
- See Create Position or Hire job aid
- See Create Position or Hire job aid
- See Create Position or Hire job aid
- See Create Position or Hire job aid
- See Create Position or Hire job aid

### HOW TO MAKE CHANGES

**Click the edit icon to open**

**Click the checkmark icon to accept changes**

**NOTE:** For changes to Organizations only, please use the **Change Organization** process.

**NOTE:** For changes to Compensation only, please use the **Request Compensation Change** process.
Process Steps (continued)

10. Review the information on the Summary page and click **Submit**

11. Process moves to next step; click **Done**
Process Steps (continued)

Which role(s) can do this step?
• HR Partner
• Recruiter

1. Log in to Workday
2. Click Inbox
3. Find the change task and click to open (opens in the right pane of the screen)

NOTE: Steps will vary based on the change being made. This step may not be required.
Process Steps (continued)

4. Review, type comments, and click Approve or Send Back with instructions.

HINT: Items that changed will have a blue dot in front and will be noted with words such as “added” or “was” with the former information.

5. The next step is dependent on the change; click Done, Open, To Do, or Skip (as appropriate).
Process Steps (continued)

Which role(s) can do this step?
• HR Partner
• HR Representative
• Initiator

1. Log in to Workday
2. Click Inbox
3. Find the Assign Organization task and click to open (opens in the right pane of the screen)
4. Review, type comments, and click Approve or Send Back with instructions
5. The next step is dependent on the change; click Done, Open, To Do, or Skip (as appropriate)

Change Activities

Review Organization Assignment

NOTE: Steps will vary based on the change being made. This step may not be required.

HINT: Items that changed will have a blue dot in front and will be noted with words such as “added” or “was” with the former information.

NOTE: Assign Collective Agreement can be skipped if it does not apply. You will be asked to provide a comment.
1. Click the prompt icon to choose from the Collective Agreements (* indicates required information)

2. Type comments and click Submit

5. The next step is dependent on the change; click Done, Open, To Do, or Skip (as appropriate)

NOTE: Maintain Employee Contract can be skipped if it does not apply. You will be asked to provide a comment.
1. Complete the Maintain Employee Contract form (* indicates required information)

**Process Steps (continued)**

**Which role(s) can do this step?**
- HR Partner
- HR Representative
- Initiator

**Screen Instructions**
Continue on next page

**WHAT IS THIS?**
Contract ID
Based on Health Ministry guidelines

**Contract Start Date**
Date contract will begin; auto-populates to change date

**Contract End Date**
Date contract will end

**Status**
Choose closed, open, or pending

**Contract Type**
Choose from menu options (see list below)

**Contract Description**
Based on Health Ministry guidelines

**Date Employee Signed**
Date colleague signed the contract

**Contract Attachments**
Click Create Worker Document from menu options to go to an attachment screen

**Contract Type**
- Advanced Practice Professional – Employment Agreement
- Allied Health Professional
- BSN – Agreements
- Education Agreement
- Employee Loan Repayment
- Executive Contract – Employment Agreement
- External Liaison
- Housing Allowance Contracts
- Medical Director Contract
- Physician Contract – Employment Agreement
- Physician Loan Repayment
- Relocation Contract
- Retention Bonus Contract
- Scholarships
- Separation Agreement
- Sign-on Bonus Contracts
- Tuition Loan Agreements
- Vendor Contracts

**Change Activities**
Maintain Employee Contract

**NOTE:** Steps will vary based on the change being made. This step may not be required.

**NOTE:** You can skip this step by clicking on the Gear and choosing Skip Step.

©2017 Trinity Health - Livonia, MI
**Process Steps (continued)**

2. Type **comments** and click **Submit**

3. The next step is dependent on the change; click **Done**, **Open**, **To Do**, or **Skip** (as appropriate)
Process Steps (continued)

1. Log in to Workday
2. Click Inbox
3. Find the Compensation Change task and click to open (opens in the right pane of the screen)

Which role(s) can do this step?
• Manager’s Manager

NOTE: This step will be skipped if the compensation change is less than 5%.

NOTE: Steps will vary based on the change being made. This step may not be required.
Process Steps (continued)

4. Review the Compensation Change form

5. Type comments and click Approve

6. Process moves to next step; click Done
Process Steps (continued)

Which role(s) can do this step?
- HR Partner
- HR Representative
- Initiator

1. Log in to Workday
2. Click Inbox
3. Find the One Time Payment task and click to open (opens in the right pane of the screen)

NOTE: Steps will vary based on the change being made. This step may not be required.
Process Steps (continued)

4. Click Add

5. Click the prompt icon to choose a One-Time Payment Plan and enter the amount

6. Type additional information and click Submit

7. The next step is dependent on the change; click Done, Open, To Do, or Skip (as appropriate)
Process Steps (continued)

1. Log in to Workday

2. Click Inbox

3. Find the PTO Accrual task and click to open (opens in the right pane of the screen)

Which role(s) can do this step?
• Absence Partner Lite
• Leave Partner

NOTE: Steps will vary based on the change being made. This step may not be required.
**Process Steps (continued)**

4. Click **Maintain Accrual and Time Off Adjustments/Overrides**

![Screen shot of Maintain Accrual and Time Off Adjustments/Overrides]

5. Type the **name of the colleague** for whom the change is occurring

![Screen shot of Maintain Accrual and Time Off Adjustments/Overrides]

6. Click **OK**
Process Steps (continued)

7. Review and make applicable changes under Adjustments or click the **add icon** to add Adjustments

8. Click **Overrides**

9. Review and make applicable changes under Overrides or click the **add icon** to add Overrides

10. Click **OK**; then click **Done** when complete
Process Steps (continued)

11. Type comments and click Submit

12. The next step is dependent on the change; click Done, Open, To Do, or Skip (as appropriate)

NOTE: Offboarding Procedure can be skipped if it does not apply. You will be asked to provide a comment.
Process Steps (continued)

Which role can do this step?
• Departing Manager
• HR Representative

1. Read Instructions and act; type comments

2. Type comments and click Submit

3. The next step is dependent on the change; click Done, Open, To Do, or Skip (as appropriate)

NOTE: This gives the opportunity to confirm all offboarding procedures for the colleague changing jobs, if applicable.

NOTE: Steps will vary based on the change being made. This step may not be required.
**Process Steps (continued)**

Which role(s) can do this step?
- Benefits Partner
- HRSS Representative

1. Log in to Workday
2. Click **Inbox**

3. Find the Benefits Coordination task and click to open (opens in the right pane of the screen)

**NOTE:** Steps will vary based on the change being made. This step may not be required.
Process Steps (continued)

4. Type comments and click Submit

5. The next step is dependent on the change; click Done, Open, To Do, or Skip (as appropriate)

NOTE: This gives the opportunity to review the change and initiate a benefit event for the colleague if it is applicable.
Process Steps (continued)

Which role(s) can do this step?
- Onboarding Representative

1. Log in to Workday
2. Click Inbox
3. Find the Assign Probation Period task and click to open (opens in the right pane of the screen)
4. Scroll down and click Add Probation Period

NOTE: Steps will vary based on the change being made. This step may not be required.
**Process Steps (continued)**

5. Type name of Worker (colleague) and click OK

6. Complete the Probation Period form and click Submit

7. Click Done
Process Steps (continued)

8. Return to the Inbox message and click **Submit**

9. The next step is dependent on the change; click **Done**, **Open**, **To Do**, or **Skip** (as appropriate)

**NOTE:**
Verify Licenses and Certifications can be skipped if it does not apply. You will be asked to provide a comment.
Process Steps (continued)

1. Log in to Workday
2. Click **Inbox**
3. Find the Verify Licenses task and click to open *(opens in the right pane of the screen)*

**Which role can do this step?**
- HR/HRSS Representative
- Recruiter

**NOTE:** Steps will vary based on the change being made. This step may not be required.
**Process Steps (continued)**

4. Read the Instructions and act

![Complete To Do Verify licenses and certifications](image)

- **For**: SUPV ORG (Rita Recruiter (5100117))
- **Overall Process**: Promotion: Carl Colleague3 (5100014)
- **Overall Status**: In Progress
- **Due Date**: 12/05/2016
- **Calendar In Use**: Consecutive Days (No Calendars Selected)
- **Instructions**: Verify if the employee has valid licenses and certifications required to perform this job.

5. Type **comments** and click **Submit**

6. The next step is dependent on the change; click **Done**, **Open**, **To Do**, or **Skip** (as appropriate)

**NOTE**: This acts as a notice to verify the colleague has valid licenses and certifications required to perform the job.
Process Steps (continued)

1. Log in to Workday
2. Click Inbox
3. Find the PTO/Sick task and click to open (opens in the right pane of the screen)

Which role(s) can do this step?
• Time Off Partner

NOTE: Steps will vary based on the change being made. This step may not be required.


**Process Steps (continued)**

4. Read the Instructions and act

![Complete To Do](image)

**NOTE:** This gives the opportunity to coordinate the transfer or payout of the colleague’s PTO/Sick based on the job change.

5. Type **comments** and click **Submit**

6. The next step is dependent on the change; click **Done**, **Open**, **To Do**, or **Skip** (as appropriate)

**NOTE:** Enter Payroll Reporting Codes can be skipped if it does not apply. You will be asked to provide a comment.
**Process Steps (continued)**

1. Log in to Workday

2. Click **Inbox**

3. Find the email and click to open *(opens in the right pane of the screen)*

**Which role(s) can do this step?**
- HR/HRSS Representative
- Onboarding Representative

**Change Activities**

**Enter Payroll Reporting Codes**

This step will only appear if the colleague’s address is in Iowa, Massachusetts, or Michigan.
**Process Steps (continued)**

4. Click **Maintain Payroll Reporting Codes for Worker**

5. Type Effective Date and search for the Worker (colleague)

6. Click **OK**
Process Steps (continued)

7. Click the prompt icon to find the proper payroll reporting code

8. Click Submit

9. Click Done

10. Return to the Inbox message and click Submit

11. The next step is dependent on the change; click Done, Open, To Do, or Skip (as appropriate)
Process Steps (continued)

Which role can do this step?
- Departing Manager
- Onboarding Representative

1. Log in to Workday
2. Click **Inbox**

3. Find the change task and click to open (opens in the right pane of the screen)

**NOTE:** Steps will vary based on the change being made. This step may not be required.
Process Steps (continued)

4. Review Inbox Items Assigned to Worker and make any changes

5. Click Business Processes about the Worker, review, and make any changes
Process Steps (continued)

6. Click **Delegations to the Worker**, review, and make any changes.

7. Type comments and click **Submit**.

8. The next step is dependent on the change; click **Done, Open, To Do**, or **Skip** (as appropriate).

NEXT STEP:
Colleague updates tax elections and benefits, if applicable.
Process Steps (continued)

Which role(s) can do this step?
• Benefits Partner

1. Log in to Workday

2. Click Inbox

3. Find the Benefit Change task and click to open
   (opens in the right pane of the screen)

NOTE: Steps will vary based on the change being made. This step may not be required.
Process Steps (continued)

4. Review Benefit Event Type

SCREEN INSTRUCTIONS
CONTINUE ON NEXT PAGE
Process Steps (continued)

5. Type **comments** and click **Approve**

6. The next step is dependent on the change; click **Done**, **Open**, **To Do**, or **Skip** (as appropriate)
1. Log in to Workday

2. Click **Inbox**

3. Find the Onboarding task and click to open *(opens in the right pane of the screen)*
**Process Steps (continued)**

4. Read the Instructions and act

5. Type **comments** and click **Submit**

6. The next step is dependent on the change; click **Done**, **Open**, **To Do**, or **Skip** (as appropriate)

**NOTE:** This gives the opportunity to confirm all onboarding procedures for the colleague.

**NEXT STEP:**
Security Partner updates user-based security groups, if applicable.
End of Process: Next Steps

WHEN CHANGE JOB PROCESS IS COMPLETE

- If applicable, Sending Manager contacts Recruiter to begin backfill process
## APPENDIX: Change Job

### Job Requisition Reasons

<table>
<thead>
<tr>
<th>Topic</th>
<th>Scenarios</th>
<th>Job Posting Guidelines</th>
<th>Job Change Reason that can be used</th>
<th>Who Initiates</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Reclassifications</td>
<td></td>
<td>Other Similarly Situated Individuals within Dept</td>
<td>No Posting Required</td>
<td>Job Reclassification</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>No Posting Required</td>
<td>Job Reclassification</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>No Posting Required</td>
<td>Job Reclassification</td>
</tr>
<tr>
<td></td>
<td>Yes (Decrease) No/Yes</td>
<td>Internal posting at minimum, additional postings (system wide and external) if needed.</td>
<td>Depends. Could be promo or transfer or other lateral move scenario</td>
<td>HR/TA</td>
</tr>
<tr>
<td>An individual's position is being reclassified including a change in title and duties.</td>
<td>Backfill Grade Change</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No</td>
<td>Yes (Increase) No</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No</td>
<td>Yes (Decrease) No/Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Reorganization</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reorganization of department, team or unit. For downsizing or reductions in force, please contact HR for policy explanation.</td>
<td></td>
<td></td>
<td></td>
<td>Manager or HR/TA</td>
</tr>
<tr>
<td>3. Career Ladders - Promotion Plans</td>
<td></td>
<td></td>
<td>Promo - Career Ladder (Career Progression)</td>
<td>Manager</td>
</tr>
<tr>
<td>In line noncompetitive promotions where individuals advance after meeting certain competencies or years of service, etc.</td>
<td></td>
<td>No Posting Required (All career ladders must be approved in advance by Human Resources).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Contingent Positions</td>
<td></td>
<td>No Posting Required</td>
<td>Job Reclassification</td>
<td>Manager</td>
</tr>
<tr>
<td>a. Changing a person from regular to contingent status.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Changing person from contingent to Regular PT/FT</td>
<td></td>
<td></td>
<td>Job Reclassification</td>
<td>Manager</td>
</tr>
</tbody>
</table>

Continued on next page
### APPENDIX: Change Job

<table>
<thead>
<tr>
<th>Topic</th>
<th>Scenarios</th>
<th>Job Posting Guidelines</th>
<th>Job Change Reason that can be used</th>
<th>Who Initiates</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>5. Part-time to Full Time</strong></td>
<td></td>
<td>New open full time positions must be posted internally at minimum, additional postings (system wide &amp; external) if needed. If there are a number of part time individuals in the department who should be considered, posting required. If simply converting an individual from part-time to full time on same position, posting not required.</td>
<td>Job Reclassification</td>
<td>Manager</td>
</tr>
<tr>
<td>Changing a person’s status from PT to FT</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>6. Shift Changes</strong></td>
<td></td>
<td>If a single incumbent position, no posting required. If there are several people in a shift who should be considered for a move to a different shift then it must be posted internally at a minimum.</td>
<td>Phase 2. Shift not collected in WD in Phase 1. Will launch with TA in Phase 2</td>
<td>n/a</td>
</tr>
<tr>
<td><strong>7. Non-Employee Status (temps, independent contractors etc) Hire Status to Regular Hire Status</strong></td>
<td></td>
<td>The position must be posted</td>
<td>n/a - would be a hire</td>
<td>HR/TA</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>8. Unsuccessful New Hires</strong></td>
<td>New hire but did not start (no show, failed background check, rescinded offer, etc)</td>
<td>No Posting Required- TA to update disposition in ATS and create/reactivate new requisition.</td>
<td>n/a</td>
<td>HR/TA</td>
</tr>
<tr>
<td>When new hires tenure is less than 90 days.</td>
<td>New hire tenure &lt; 90 Days</td>
<td>No Posting Required- TA to update disposition in ATS and create new requisition. Depends on local requirements for posting approval.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>New hire tenure &gt; 90 Days</td>
<td>No Posting Required- TA to update disposition in ATS and create new requisition. Depends on local requirements for posting approval.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>9. Passed Boards</strong></td>
<td>Hired into role (ie: GNI) role with understanding that after passing board exams they will be promoted into higher (ie: RN) position</td>
<td>No Posting Required - Use in clinical setting when a clinician passes a board exams that qualifies for higher level role, grade, or payrate.</td>
<td>Promo - Passed Boards</td>
<td>Manager</td>
</tr>
</tbody>
</table>