

Initiate & Track Job Changes

This guide shows you how to start a job change for someone on your team in Workday, complete the required details, and track the request through to completion. It covers three common examples a manager initiates: a compensation change, a manager change, and a promotion.

Who is this for: People Managers and HR

Time to complete: 10 to 15 minutes

Before You Start

- You are initiating this change for someone on your team
- You know the reason for the change and its effective date
- You have any supporting details ready (new pay, new manager/team, or job profile for a promotion)
- For anything involving risk (performance, conduct, or a separation), you have looped in HR before you begin

After You Submit a Change

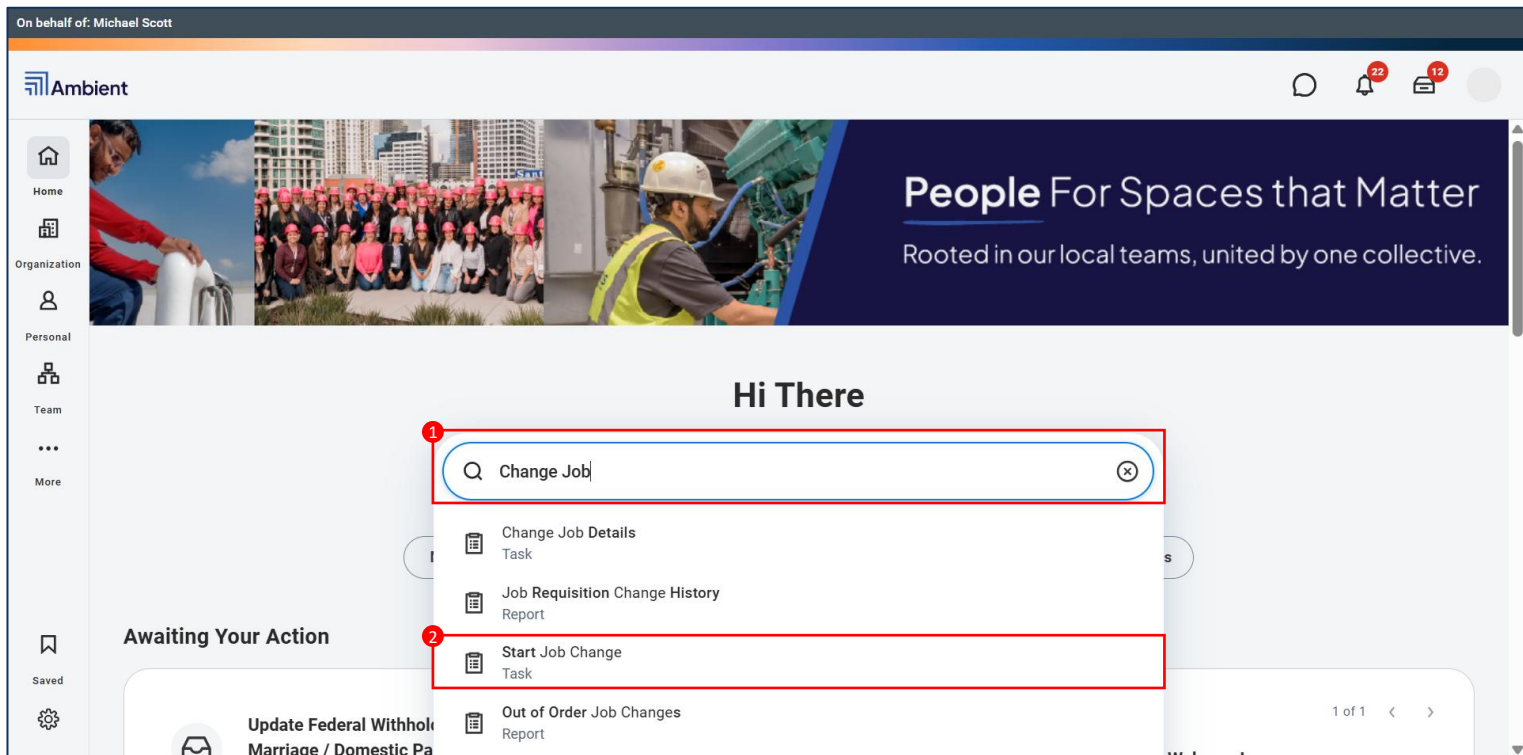
- The request routes for approval - typically HRBP review, and the receiving manager if the person is moving teams
- If pay or job profile changes, the Benefits and/or Compensation Partner reviews benefits and compensation impacts
- The person may get new tasks (training, onboarding, or benefit elections) for their new role
- You'll get a Workday notification when the change is approved or if more information is needed
- The change takes effect and becomes visible on the effective date once fully approved

Start a Job Change

STEP 1:

From the Workday homepage:

1. Click the Search Bar and type **Change Job**
2. Select the **Start Job Change** task



Start a Job Change

STEP 2:

Select the employee in the Worker field. Their current Job fills in automatically once the worker is chosen.

Start Job Change

Worker *

X Ross Geller

Job *

Marketing Manager - Ross Geller

What do you want to do? *

Cancel

OK

Start a Job Change- Choose What You're Changing

STEP 3:

On the "What do you want to do?" screen, select the scenario that fits:

1. **Change Job Details** - for a job profile or title change, a transfer, a manager or team change, and any related compensation change. This option opens all the detail sections, including compensation
2. **Change Location** - for a change in where the role is based
3. **Promote** - for a promotion

Start Job Change

Worker *

X Ross Geller

Job *

Marketing Manager - Ross Geller

What do you want to do? *

Search

☐ Change Job Details

☐ Change Location

☐ Promote

Cancel OK

Note: Any job change that moves the employee into a new role - transfer, promotion, demotion, or lateral move generates an offer letter for the employee. A compensation-only Data Change (same role and position) does not.

Example 1 of 3: Change Job Details: Compensation

Use this when the employee's pay is changing but their level and role stay the same.

STEP 1:

From the Start Change Job Menu:

1. Click on the **Edit** Icon
2. Enter the effective date, reason, new manager, new team and Location

Post this click start.

Start

Start Details

2

When do you want this change to take effect? *

08/23/2026

Why are you making this change? *

Change Job Details

Who will be the manager after this change?

Michael Scott

Which team will this person be on after this change?

Michael Scott

Where will this person be located after this change? *

GBS - Berkeley Heights

1



Do you want to use the next pay period?

Yes

Note: Steps 1 and 2 are the same for every job change. The following slides start where each scenario differs.

Example 1 of 3: Change Job Details: Compensation

STEP 2:

Complete the Compensation section only:

- 1. Click on the Edit icon
- 2. Update the **salary amount** (and pay plan or allowance where they apply). Leave job profile, title, and level unchanged
- 3. If needed add the Allowance and commission data details

Review the details and click **Submit**. To finish later, click Save for Later and return from My Tasks.

Compensation

Salary

2

Assignment Details

• 2.01 USD Annual was 2.00 USD Annual

Plan Name

Salary Plan

Effective Date

• 08/23/2026 was 07/26/2026

1

✕

✎

Hourly

Allowance

3

Add

Commission

Example 1 of 3: Change Job Details: Compensation

STEP 3:

Compensation-impacting changes route to HR Partner for review before they are finalized.

Details and Process

For

Michael Scott

Overall Process

Data Change: Ross Geller

Overall Status

In Progress

Due Date

08/18/2026

Details

Process

Process History 3 Items

Process

Step

Status

Completed On

Due Date

Person (Up to 5)

All Persons

Comment

Change Job

Change Job

Step Completed

08/11/2026 10:46:40 AM

08/18/2026

Michael Scott

1

Change Job

Review: Current Manager

Not Required

08/18/2026

0

Change Job

Review: Receiving Manager

Awaiting Action

08/13/2026

Partner

(Proposed HR Partner)

1

Done

Click here to review remaining process details.

Note: Beyond HR Partner review, depending on the change, compensation-impacting changes may also route to the Compensation Partner for approval.

Example 2 of 3: Change Job Details: Manager

Use this when the employee is moving to a new manager or team, at the same level.

STEP 1:

Select the employee in the Worker field. Their current Job fills in automatically once the worker is chosen. On the "What do you want to do?" screen, select the **"Change Job Details"** option for a manager change.

Start Job Change

1

Worker *

X

Talent Administrator

...

⋮

Job *

Technician - Talent Administrator

2

What do you want to do? *

X

Change Job Details

⋮

Access all job change sections, including compensation.

3

Cancel

OK

Example 2 of 3: Change Job Details: Manager

STEP 2:

- To make the change click the **Edit** icon
1. Input the date you want this change to take effect from
 2. Change the Manager to the new manager
 3. Update the team the employee is moving to
- Leave job profile, title, and level unchanged. Review the details and click **Start**.

Start

Start Details

1

When do you want this change to take effect? *

08 / 16 / 2026

Why are you making this change? *

Change Job Details

Do you want to use the next pay period?

☒

2

Who will be the manager after this change?

X

Martha Manager's Manager

3

Which team will this person be on after this change?

X

Organization

Level I (Martha Manager's Manager)

Where will this person be located after this change? *

X

DMGN - Castro Valley

Ambient

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Example 2 of 3: Change Job Details: Manager

STEP 3:

From the dropdown select “**Why are you making the change?**” with the appropriate reason and click the **Submit** icon.

Change Job

Move to New Manager

Current Organization

Strada Test Organization Level II (Molly Manager)

Position

Technician -

When do you want this change to take effect? *

Why are you making this change? *

×

Move to New Manager > Move to Another Manager

Who will be the manager after this change? *

×

Manager

Note: Manager changes route to HR Partner for review before they are finalized.

Example 3 of 3: Promotion

Use this when the employee is moving up a level.

STEP 1:

From the Change Job menu, select the **Worker** and the **Promote** option. Post this click OK to proceed.

The screenshot shows a 'Start Job Change' dialog box. It has a title bar with a bookmark icon and a close icon. The main content area has three sections:

- Worker ***: A red box with a '1' in the top-left corner highlights this section. It contains a search bar with 'X Ross Geller' and a menu icon.
- Job ***: This section shows 'Marketing Manager - Ross Geller'.
- What do you want to do? ***: A red box with a '2' in the top-left corner highlights this section. It contains a search bar with 'X Promote' and a menu icon.

Below these sections is a note: 'Access all job change sections for a promotion, including compensation.'

At the bottom right, there are two buttons: 'Cancel' and 'OK'. A red box with a '3' in the top-left corner highlights the 'OK' button.

Note: Steps 1 and 2 are the same for every job change. The following slides start where each scenario differs.

Example 3 of 3: Promotion

STEP 2:

On the Start Details screen, click the edit icon to enter the effective date and the reason for the promotion. Click Start.

Start

Start Details

When do you want this change to take effect? *

08/23/2026



Why are you making this change? *

Promotion

Who will be the manager after this change?

Michael Scott

Which team will this person be on after this change?

Michael Scott

Where will this person be located after this change? *

GBS - Berkeley Heights

Do you want to use the next pay period?

Yes

Example 3 of 3: Promotion

STEP 3:

Complete the sections that open: Job (update Job Profile and Job Title to the new level), Location and Compensation (update salary). Click on Submit once you have made the updates to the sections.

Job

Job Profile

Job Profile *

Marketing Manager

Job Title

Marketing Manager

Location

Location Details

Location *

GBS - Berkeley Heights

Scheduled Weekly Hours

40

Compensation

Salary

Assignment Details

2.01 USD Annual

Plan Name

Salary Plan

Effective Date

08/23/2026

Hourly

Allowance

Add

Commission

Note: For interns, you must select Yes to create a new position when promoting them. In all other cases, select No and continue.

Example 3 of 3: Promotion

STEP 4:

Promotion changes route to HR Partner for review before they are finalized.

Details and Process

For

Michael Scott

Overall Process

Promotion: Ross Geller

Overall Status

In Progress

Due Date

08/18/2026

Details

Process

Process History 3 items

Process

Step

Status

Completed On

Due Date

Person (Up to 5)

All Persons

Comment

Change Job

Change Job

Step Completed

08/11/2026 02:49:41 PM

08/18/2026

Michael Scott

1

Change Job

Review: Current Manager

Not Required

08/18/2026

0

Change Job

Review: Receiving Manager

Awaiting Action

08/13/2026

(Proposed HR Partner)

1

Note: Beyond HR Partner review, depending on the change, compensation-impacting changes may also route to the Compensation Partner for approval.

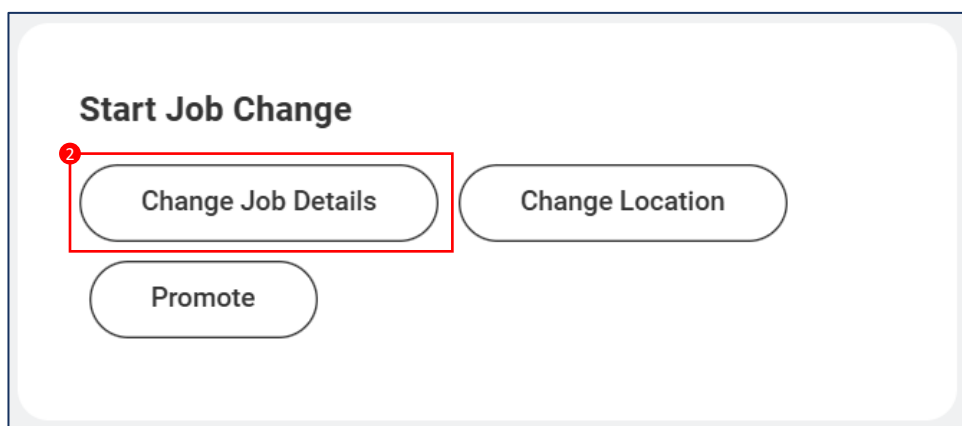
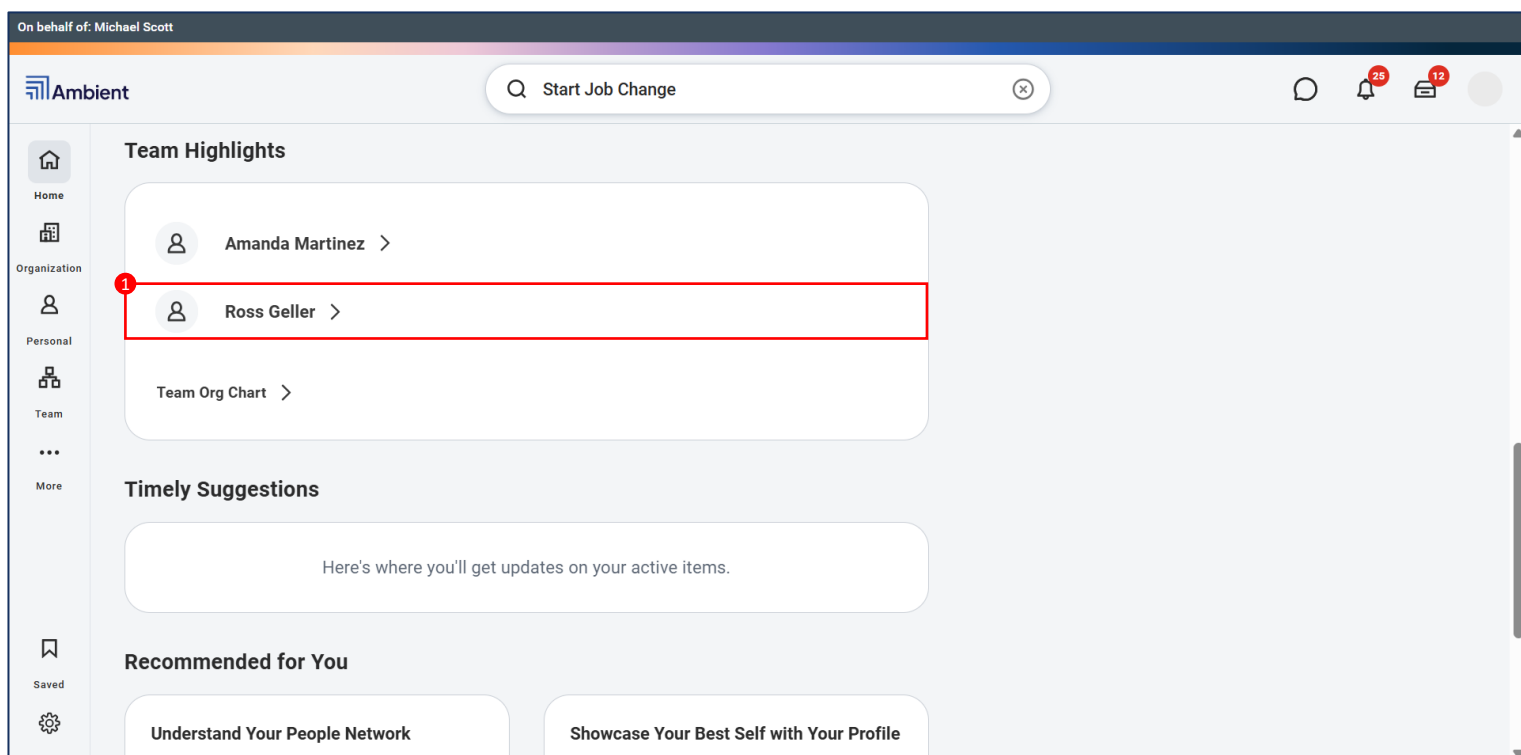
Note: You'll get a Workday notification when the change is approved, or if more info is needed. Once approved, it takes effect on the effective date and appears on the employee's profile.

Track the Job Change

STEP 1:

To see where a job change stands, open it from your team:

1. On the Workday homepage, go to Team Highlights and select the team member
2. From the Start Job Change Section click on Change Job Details to open the event, then open View Change Job



Track the Job Change

STEP 2:

To see where a job change stands select the Process tab to see the full Process History.

Start Job Change

The worker has pending events that conflict with this job change. Resolve the listed events before initiating a new job change. If there are no events listed, contact your administrator.

Worker

Ross Geller

Actions

1 item

Action	Effective Date	Initiated On	Due Date	Completed On	Status	Assigned To	Initiating Organization	Receiving Organization
Promotion: Ross Geller	08/23/2026	08/11/2026 02:49:41 PM	08/18/2026		In Progress		Michael Scott	Michael Scott

Note: Terminations are a separate action, started from My Team Management → Terminate. They are handled with HR, and for involuntary cases, with Legal. Partner with HR before initiating a termination.

Track the Job Change

STEP 3:

The Process History lists each step, who it is assigned to, and where the change currently sits. Common statuses:

- **In Progress (overall)** - the change is still moving through its steps
- **Step Completed** - that step is done
- **Awaiting Action** - someone needs to act before it can move forward (the Person column shows who)
- **Not Required** - that step was skipped for this change.

Details and Process

For

Michael Scott

Overall Process

Promotion: Ross Geller

Overall Status

In Progress

Due Date

08/18/2026

Details

Process

Process History 3 items

Process

Step

Status

Completed On

Due Date

Person (Up to 5)

All Persons

Comment

Change Job

Change Job

Step Completed

08/11/2026 02:49:41 PM

08/18/2026

Michael Scott

1

Change Job

Review: Current Manager

Not Required

08/18/2026

0

Change Job

Review: Receiving Manager

Awaiting Action

08/13/2026

(Proposed HR Partner)

1

Note: Once all steps are complete, the change takes effect and is visible on the effective date and appears on the worker's profile; downstream updates then proceed automatically. If the worker already has a pending event that conflicts, Workday will ask you to resolve it before starting a new job change.

Note: Terminations are a separate action, started from My Team Management - Terminate. They are handled with HR, and for involuntary cases, with Legal. Partner with HR before initiating a termination.

References

Key Things to Know

- As a manager, you are responsible for approving job changes, compensation changes, and other tasks routed to you. Monitor your My Tasks inbox daily
- A job change into a new role (transfer, promotion, demotion, or lateral move) generates an offer letter; a compensation-only change does not
- Timely approvals are critical. Delayed approvals can impact employee pay, benefits, and process completion. If you cannot action a task, delegate it
- If you manage multiple supervisory organizations, all tasks from those teams will appear in your single My Tasks inbox
- You can view your team's details, org chart, and performance information at any time using the search bar
- Some processes you initiate (e.g., job changes, position requests) will require approval from your manager and/or HR before they are completed
- If a task was sent to you by mistake, use Send Back to return it rather than leaving it unactioned
- Always delegate your approvals before going on leave so your team's requests are not delayed
- Completed tasks move to the Archive section in My Tasks. You can review past actions at any time
- You can access all manager tasks from both desktop and the Workday mobile app

If A Change Isn't Showing Up:

A change you made may not appear right away. This is usually a display issue, not a lost update. Before contacting support, try:

- Refreshing the page
- Logging out and logging back in
- Clearing your browser cache, cookies, and history

These steps fix most display glitches.

If you have questions or need support, here is how to get help

Support Channel	Details
Email Id	workdaysupport@ambient-enterprises.com

Tip: Bookmark the Digital Resource Repository for quick access to all Workday job aids, recorded demos, and FAQs.