

# Decreasing Employee FTE

This process is for decreasing worker FTE's - this should not be used to move to PRN status. For a move to PRN status, please follow that specific SOP. For changes that include multiple job details, like location or cost center along with a decrease FTE please follow the All Other Job changes SOP.

33 Steps [View most recent version](#) 

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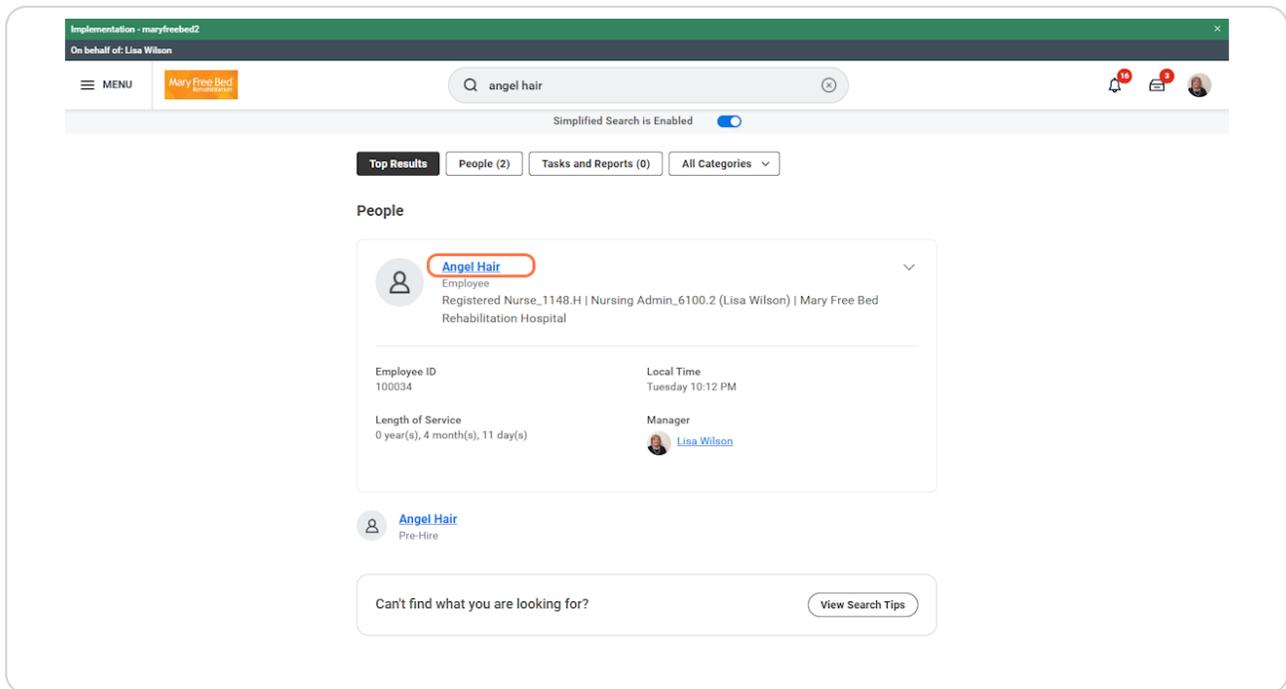
Created by	Creation Date	Last Updated
Alex Drabik	Dec 03, 2024	Dec 04, 2024

## # Submitting the Decrease in FTE Request

20 Steps

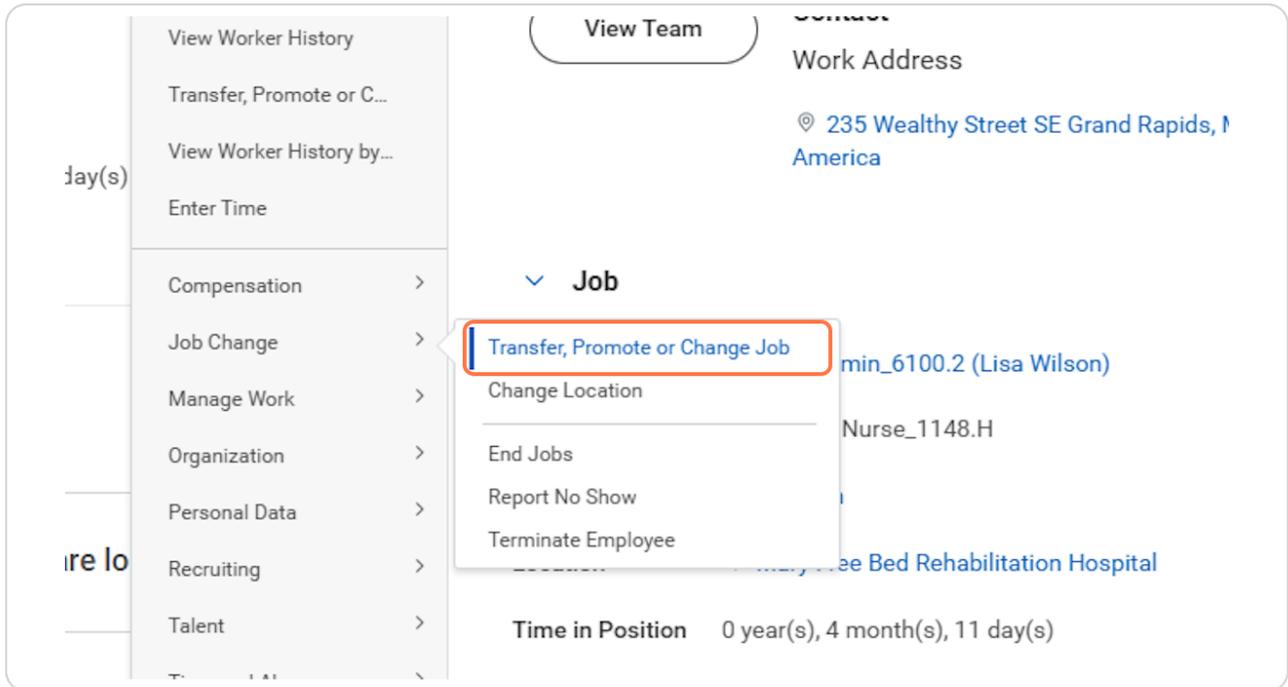
### STEP 1

**Search for the worker and select the worker object.**



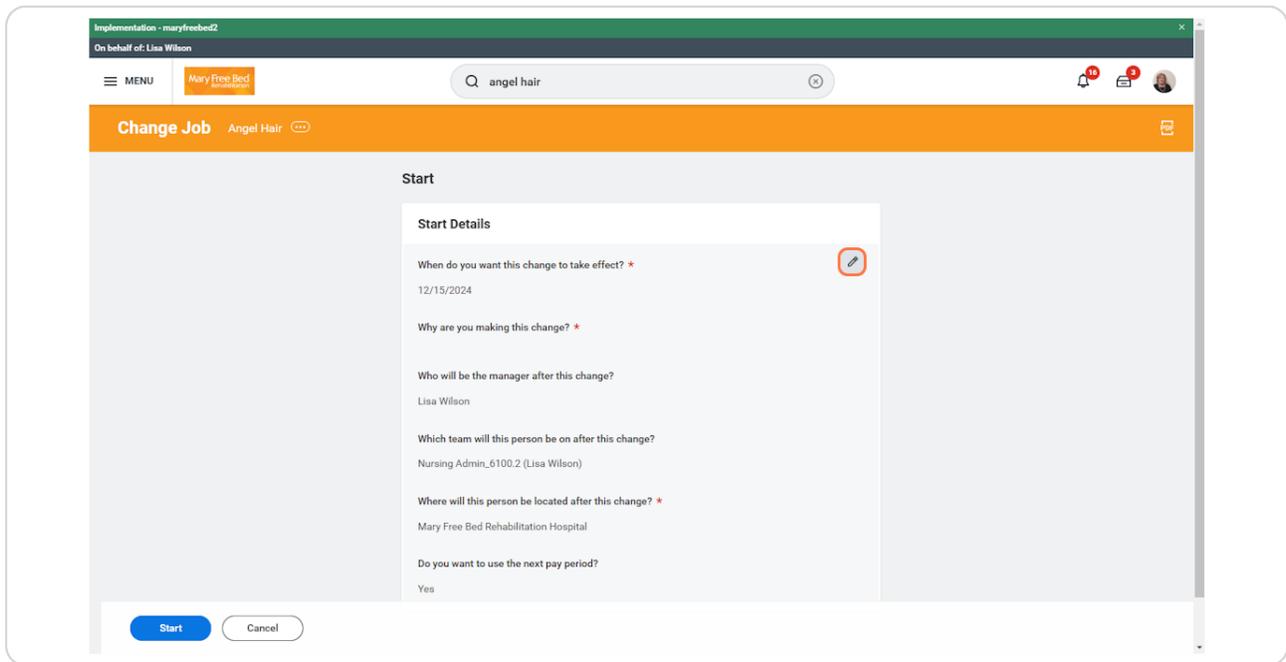
STEP 2

Click "Actions" under the employee name, hover over Job Change>Click on Transfer, Promote or Change Job



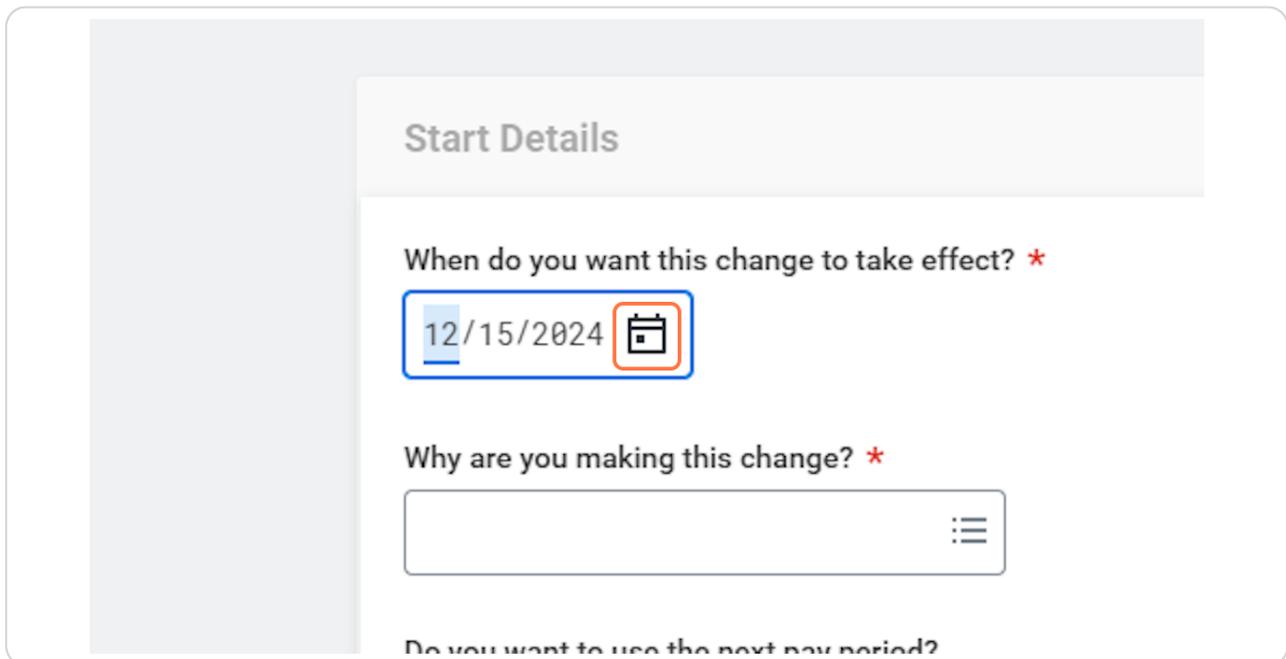
### STEP 3

**Click on the edit pencil or directly on the object you need to edit.**



### STEP 4

**Select the Effective Date of the FTE decrease.**



**STEP 5**

**Select Data Changes > FTE decrease from the 'Why are you making this change?' menu.**

Why are you making this change? \*

Search

← Data Changes

Change Job Details

Change Location

FTE Decrease

PRN (Resource) Status Change

Which team will this person be on after this change?

× Nursing Admin\_6100.2 (Lisa Wilson)

Where will this person be located after this change? \*

× Mary Free Bed

## STEP 6

No other changes are permitted in this process. Click Start.

**Start**

**Start Details**

When do you want this change to take effect? \* 🔍 ✓

12/15/2024 📅

Why are you making this change? \*

✕ FTE Decrease ⋮

Do you want to use the next pay period?

Who will be the manager after this change?

✕ Lisa Wilson ⋮

Which team will this person be on after this change?

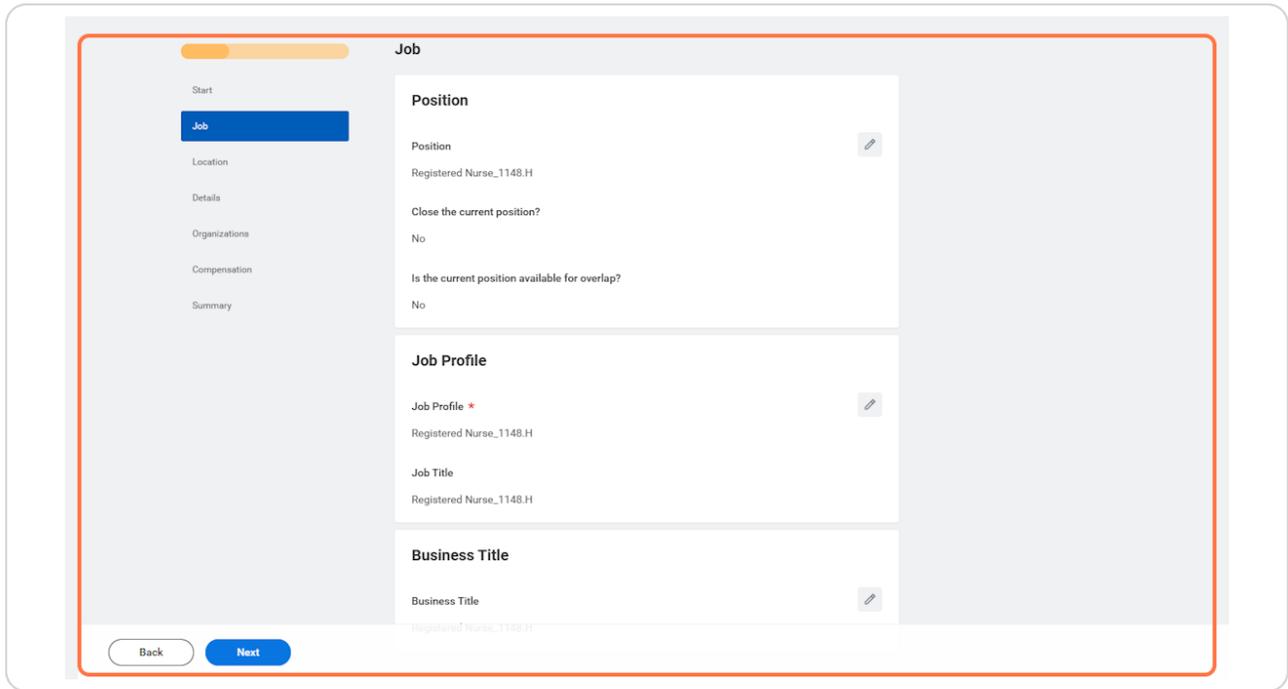
✕ Nursing Admin\_6100.2 (Lisa Wilson) ⋮

Where will this person be located after this change? \*

✕ Mary Free Bed Rehabilitation Hospital ⋮

## STEP 7

You can review job details, note no changes are permitted in this section during this process. Click Next.



The screenshot shows a web interface for job management. On the left is a vertical sidebar with a progress indicator at the top. The sidebar items are: Start, Job (highlighted in blue), Location, Details, Organizations, Compensation, and Summary. The main content area is titled 'Job' and contains three sections: 'Position', 'Job Profile', and 'Business Title'. Each section has a text field with a value and an edit icon. The 'Position' section includes two questions: 'Close the current position?' and 'Is the current position available for overlap?'. At the bottom of the main area are 'Back' and 'Next' buttons.

Section	Field Name	Value	Action
Position	Position	Registered Nurse_1148.H	Edit
	Close the current position?	No	
Job Profile	Job Profile *	Registered Nurse_1148.H	Edit
	Job Title	Registered Nurse_1148.H	
Business Title	Business Title	Registered Nurse_1148.H	Edit

## STEP 8

**Location section is where we will update the workers scheduled weekly hours.**

Enter the appropriate scheduled weekly hours. Note FTE will automatically calculate in later steps.

The screenshot shows a web application interface for updating worker information. The user is logged in as Lisa Wilson. The page title is "Change Job" and the current job is "Angel Hair". The "Location" section is active, showing a search for "Mary Free Bed Rehabilitation Hospital" and a "Scheduled Weekly Hours" field set to "40".

**Location**

Location Details

Location \*

Search

Mary Free Bed Rehabilitation Hospital

Scheduled Weekly Hours

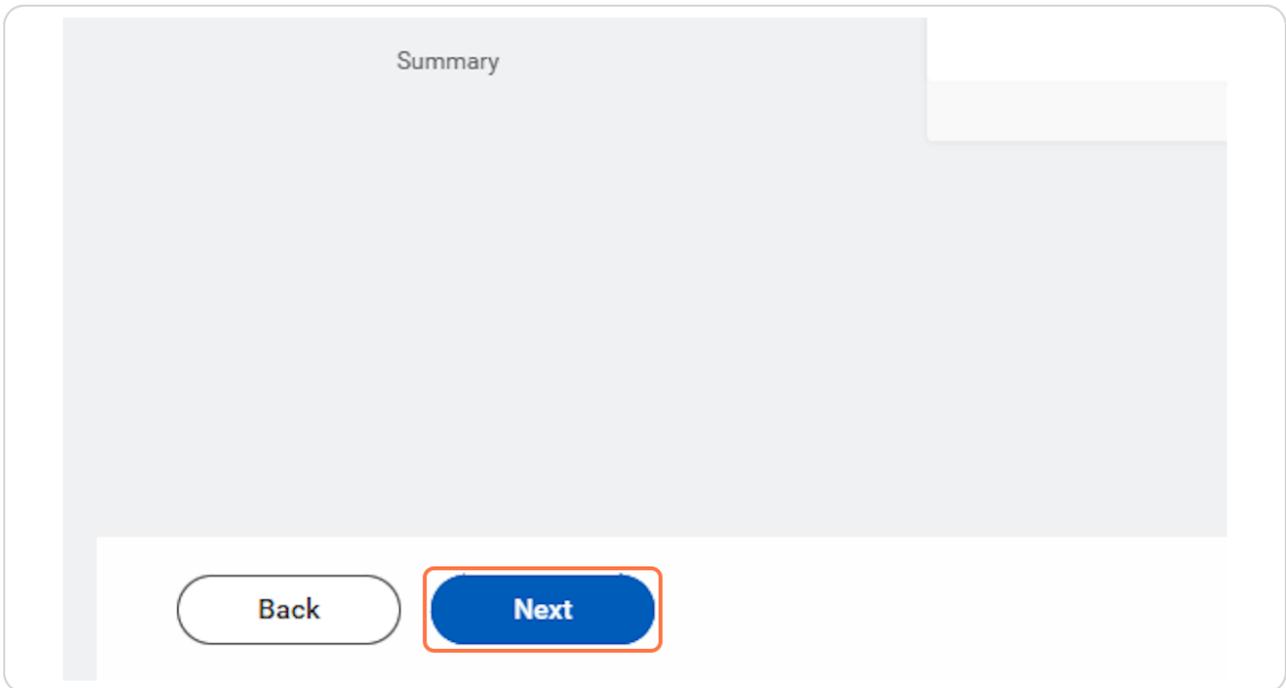
40

Work Shift

Back Next

**STEP 9**

**Click on Next**



## STEP 10

### When decreasing an FTE you may need to update Time Type.

Full Time = .75 FTE + (30 scheduled weekly hours or more)

Part Time = .1 FTE - .74 FTE (4 - 29 scheduled weekly hours)

Resource = 0 FTE ( 0 weekly scheduled hours)

The screenshot displays a web interface for job classification details. On the left is a navigation menu with options: Job, Location, Details (highlighted in blue), Organizations, Compensation, and Summary. The main content area is titled 'Additional Job Classifications' and contains an 'Administrative' section. This section includes the following fields: 'Employee Type \*' (set to 'Regular', with an edit icon circled in red), 'Time Type \*' (set to 'Full time'), 'Pay Rate Type' (set to 'Hourly'), 'Location Weekly Hours' (set to '40'), 'Default Weekly Hours' (set to '40'), 'FTE' (set to '50%'), 'Job Exempt', and 'Job Category' (set to 'Direct Patient Care'). At the bottom of the page, there are 'Back' and 'Next' buttons.

## STEP 11

Click on Time Type and select the appropriate time type. See guide above.

The screenshot shows an administrative form titled "Administrative". It contains several fields:

- Employee Type \***: A dropdown menu with a search bar and a selected option "Regular".
- Time Type \***: A dropdown menu with a selected option "Full time". This field is highlighted with a red border.
- Pay Rate Type**: A dropdown menu with a selected option "Hourly".
- Location Weekly Hours**: A text input field containing the value "40".
- Default Weekly Hours**: A text input field containing the value "40".

**i** DO NOT EDIT ANY OTHER HOURS IN THIS SECTION

## STEP 12

**Note FTE has automatically updated based on the hours we input in previous steps.**

**Pay Rate Type**  
× Hourly

**Location Weekly Hours**  
40

**Default Weekly Hours**  
40

**FTE**  
50%

**Job Exempt**

**Job Category**  
Direct Patient Care

**Job Classifications**  
2 - Professionals (EEO-1 Job Categories-United States of America)

**Management Level**

### STEP 13

Click on Next

The screenshot shows a form with two date selection fields. The first field is labeled "First Day of Work" and contains the date "12/15/2024" with a calendar icon. The second field is labeled "Notify By" and also contains "12/15/2024" with a calendar icon. At the bottom of the form, there are two buttons: "Back" and "Next". The "Next" button is highlighted with a red border.

### STEP 14

Click on Next as no compensation changes should be made in this process.

The screenshot displays a compensation details page. On the left, there is a navigation menu with "Compensation" selected. The main content area shows the following information:

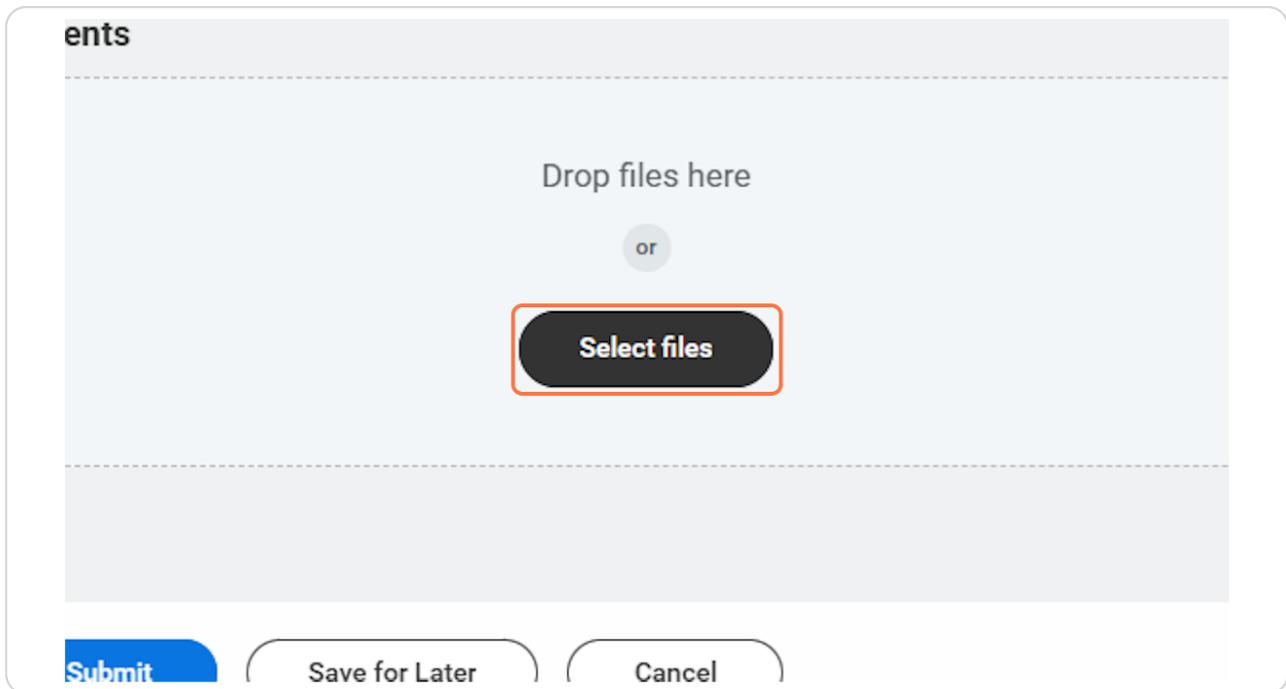
- Position in Range: 13.52%
- Guidelines:
  - Total Base Pay Range: 32.05 - 39.26 - 46.47 USD Hourly
  - Compensation Package: General Compensation Package
  - Grade: 8H
  - Grade Profile: National\_8H
- Hourly:
  - Assignment Details: 34.00 USD Hourly (with close and edit icons)
  - Plan Name: Hourly Plan
  - Effective Date: 07/22/2024

At the bottom of the page, there are "Back" and "Next" buttons. The "Next" button is highlighted with a red border.

## STEP 15

### **An attachment is required for all job change requests.**

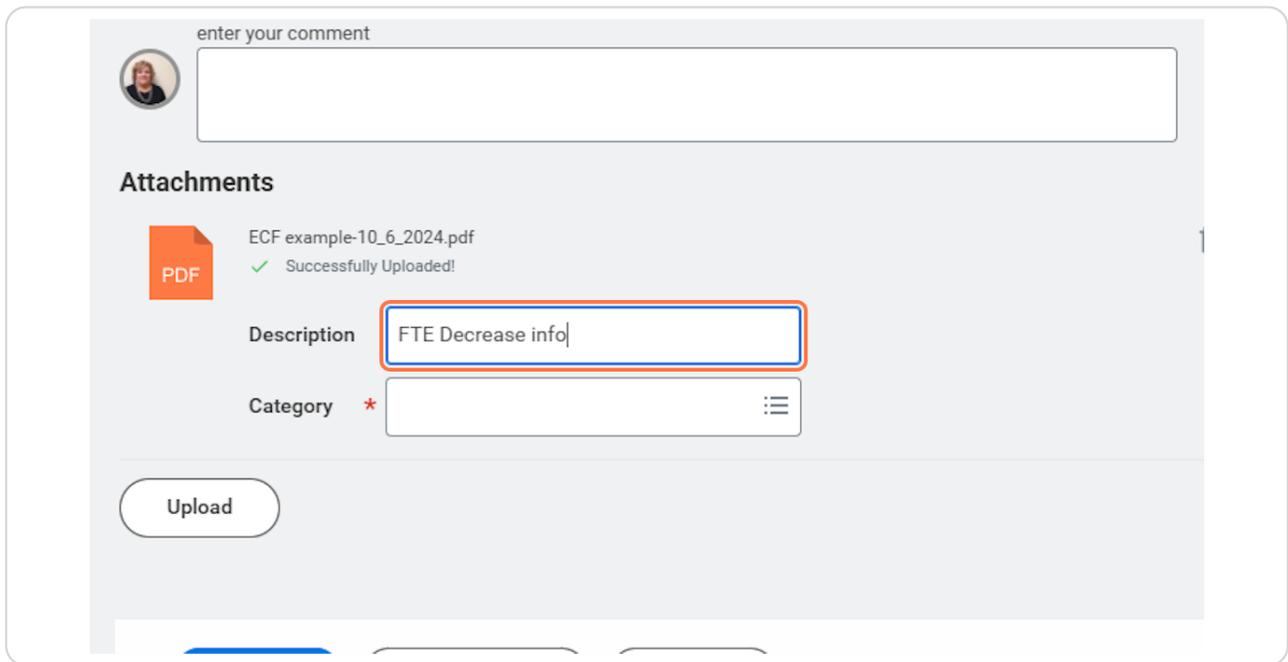
Click select files to upload an attachment, this can be the employee request to decrease FTE, leader approval, or simply a word document outlining the request details.



The screenshot shows a file upload interface. At the top left, the text "ents" is partially visible. The main area is a light blue box with a dashed border. Inside, the text "Drop files here" is centered, followed by a small grey circle containing the word "or". Below this is a dark grey button with the text "Select files" in white, which is highlighted with a red rectangular border. At the bottom of the interface, there are three buttons: a blue "Submit" button, a white "Save for Later" button, and a white "Cancel" button.

**STEP 16**

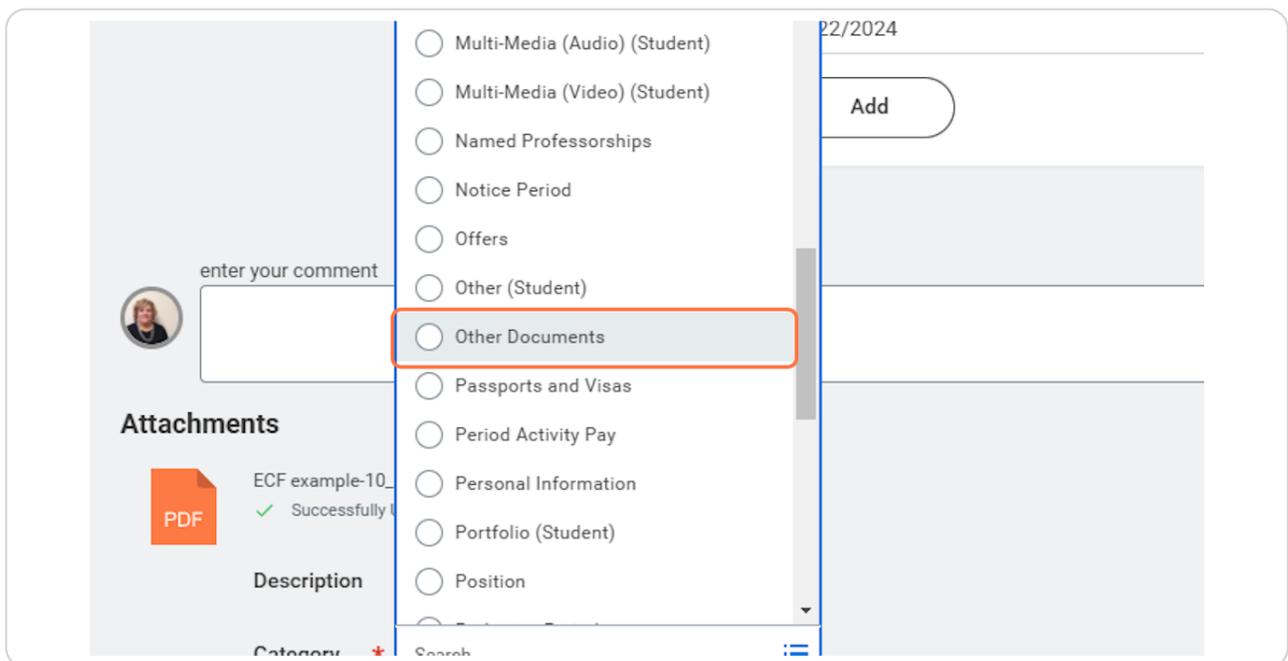
**Enter a description of the document you attached.**



The screenshot shows a user interface for uploading a document. At the top, there is a profile picture and a text input field labeled "enter your comment". Below this is the "Attachments" section. A PDF file named "ECF example-10\_6\_2024.pdf" is shown with a green checkmark and the text "Successfully Uploaded!". The "Description" field contains the text "FTE Decrease info" and is highlighted with a red and blue border. Below the description is a "Category" dropdown menu with a red asterisk and a search icon. At the bottom left of the attachment area is an "Upload" button.

**STEP 17**

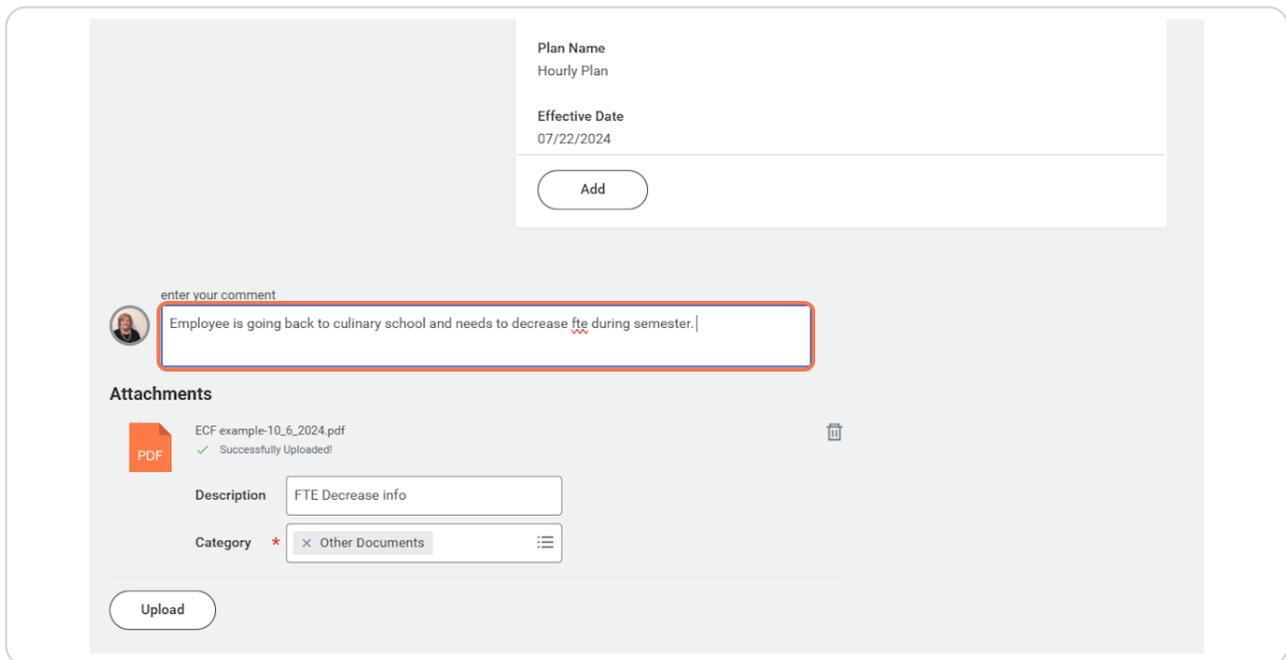
**Select the document category, typically this will be 'Other Documents'**



The screenshot shows the same document upload form as in Step 16, but with the "Category" dropdown menu open. The menu lists several categories with radio buttons: "Multi-Media (Audio) (Student)", "Multi-Media (Video) (Student)", "Named Professorships", "Notice Period", "Offers", "Other (Student)", "Other Documents", "Passports and Visas", "Period Activity Pay", "Personal Information", "Portfolio (Student)", and "Position". The "Other Documents" option is highlighted with a red and blue border. The background shows the "enter your comment" field and the "Attachments" section with the PDF file and description field.

## STEP 18

Comments summarizing the change request are encouraged.

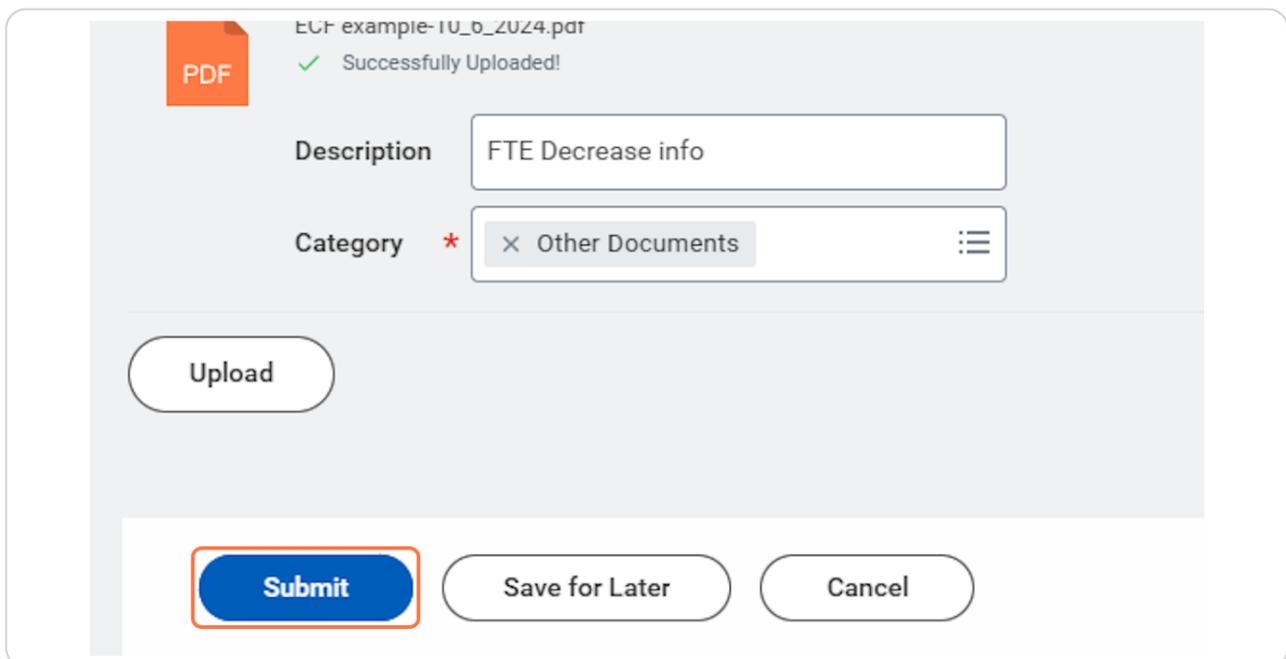


The screenshot shows a form with the following elements:

- Plan Name:** Hourly Plan
- Effective Date:** 07/22/2024
- Add:** A button to add the plan.
- Comment:** A text area with the placeholder "enter your comment" and the text "Employee is going back to culinary school and needs to decrease fte during semester." The text area is highlighted with a red border.
- Attachments:**
  - ECF example-10\_6\_2024.pdf:** A PDF icon, a checkmark, and the text "Successfully Uploaded!"
  - Description:** A text box containing "FTE Decrease info".
  - Category:** A dropdown menu with "Other Documents" selected and a red asterisk to its left.
- Upload:** A button to upload the attachment.

## STEP 19

Click on Submit



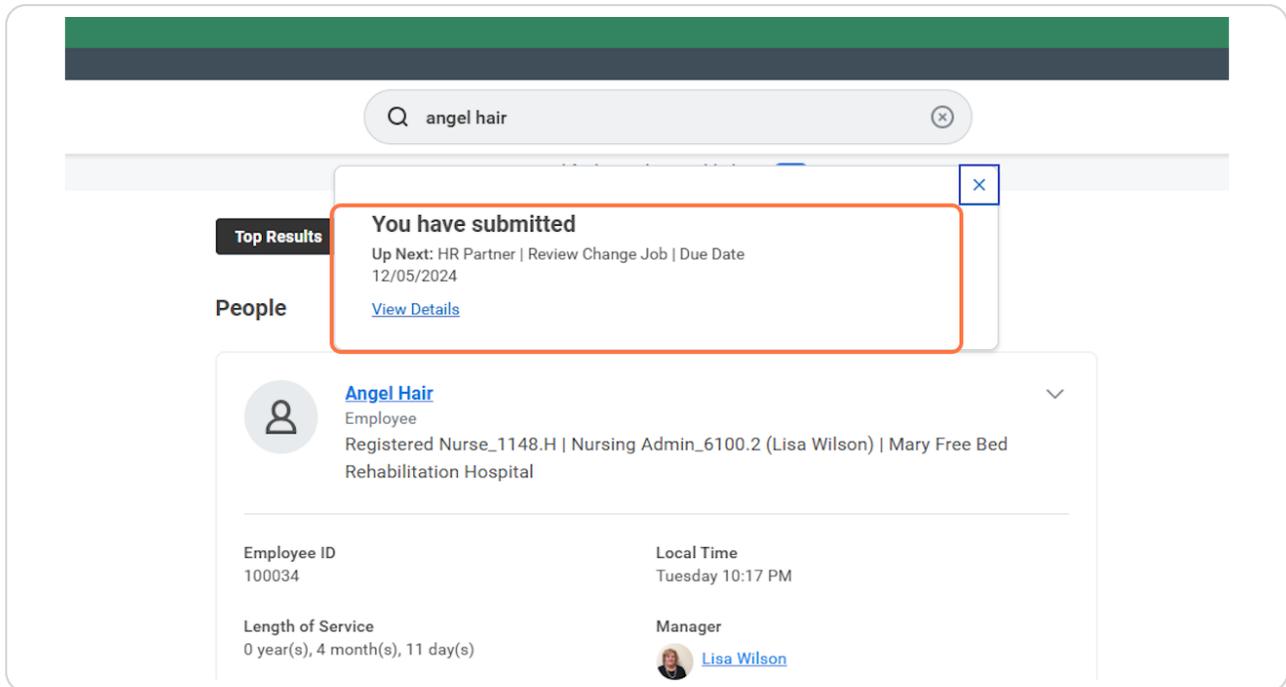
The screenshot shows the same form as in Step 18, but with the following changes:

- ECF example-10\_6\_2024.pdf:** A PDF icon, a checkmark, and the text "Successfully Uploaded!"
- Description:** A text box containing "FTE Decrease info".
- Category:** A dropdown menu with "Other Documents" selected and a red asterisk to its left.
- Upload:** A button to upload the attachment.
- Submit:** A blue button with a white border, highlighted with a red border.
- Save for Later:** A button to save the form for later.
- Cancel:** A button to cancel the form.

## STEP 20

### You have now submitted the job change request for your worker.

As you wait for HR to approve you can follow the next steps to view progress. Or you can skip to step 25 for instructions on how to complete remaining tasks after HR approval.



The screenshot shows a web application interface with a search bar at the top containing the text "angel hair". Below the search bar, a notification box is highlighted with an orange border. The notification reads "You have submitted" and provides the following details: "Up Next: HR Partner | Review Change Job | Due Date 12/05/2024" and a "View Details" link. Below the notification, the "People" section displays the profile for "Angel Hair", an Employee. The profile includes the following information: Employee ID 100034, Local Time Tuesday 10:17 PM, Length of Service 0 year(s), 4 month(s), 11 day(s), and Manager Lisa Wilson (with a profile picture icon).

## # Viewing pending Job Changes

4 Steps

STEP 21

Click on View Details on the pop up.

The screenshot shows a user interface with a sidebar on the left and a main content area. The sidebar has a 'Top Results' button and a 'People' section. The main content area features a notification box titled 'You have submitted' with the text 'Up Next: HR Partner | Review Change Job | Due Da 12/05/2024' and a 'View Details' link. Below the notification is a user profile card for 'Angel Hair', an Employee at 'Rehabilitation Hospital' with ID 'Registered Nurse\_1148.H | Nursing Admin\_61C'. The 'View Details' link and the user profile card are highlighted with red boxes.

STEP 22

Click on Details and Process

The screenshot shows a user interface with a 'Up Next' section. The text reads 'HR Partner', 'Review Change Job', and 'Due Date 12/05/2024'. Below this is a button with a right-pointing chevron icon and the text 'Details and Process'. The button is highlighted with a red box.

STEP 23

Click on Process to view remaining steps in the process.

Overall Process    [Data Change: Angel Hair](#)

Overall Status    In Progress

Due Date        12/10/2024

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[Details](#)    **Process**

[View Details](#)

▼ **Attachments**

## STEP 24

In this example we can see review job change is awaiting action with an HR partner.

Step	Status	Completed On	Due Date	Person (Up to 5)	All Persons	Comment
Original Job	Step Completed	12/03/2024 10:17:55 PM	12/10/2024	Lisa Wilson	1	Alexus Brandenburg on behalf of Lisa Wilson: Employee is going back to culinary school and needs to decrease fte during semester.
Review: Current Manager	Not Required		12/10/2024		0	
Review: Receiving Manager	Not Required		12/10/2024		0	
Review Change Job	Awaiting Action		12/05/2024	Alexus Brandenburg (Proposed HR Partner) (***)	7	
				Chelsea Bellmer (Proposed HR Partner)		
				Dawn Boomers (Proposed HR Partner)		
				Hannah Heisler (Proposed HR Partner)		
				Kolton Pavlicek (Proposed HR Partner)		

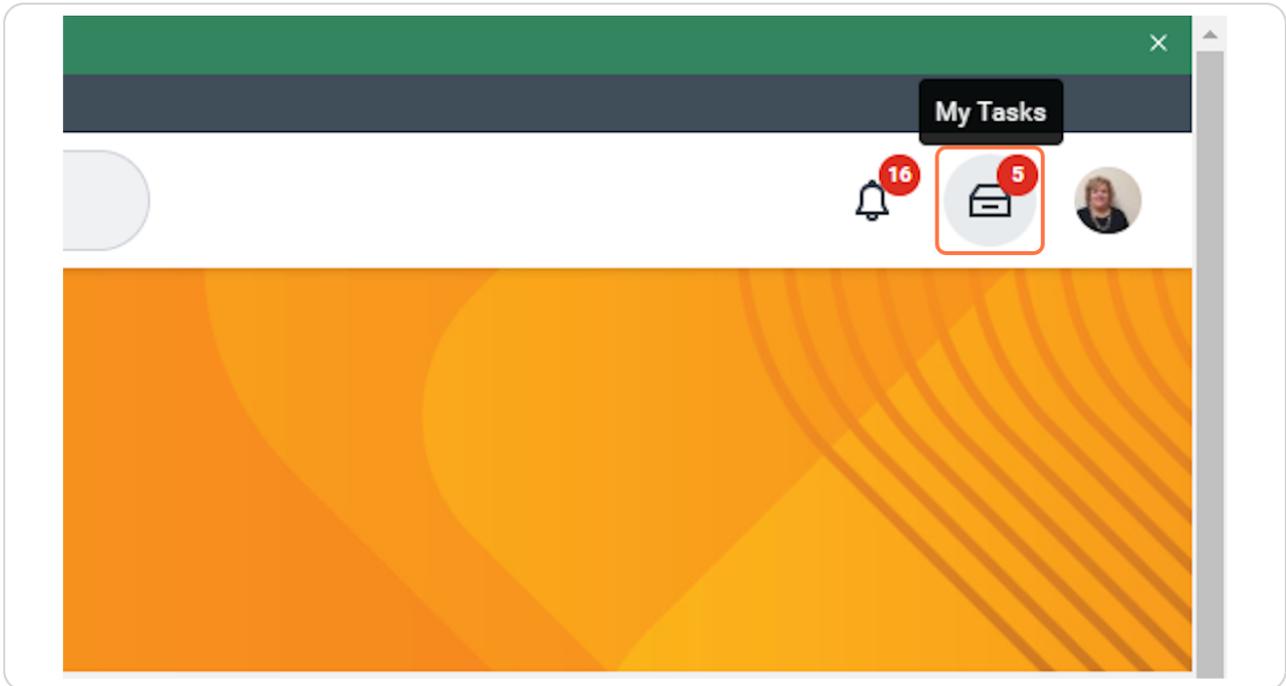
review remaining process details.

## # Post Approval Tasks

9 Steps

STEP 25

Click on the 'My tasks' Workday inbox.



## STEP 26

### Click on the task to complete, we'll look at assign work schedule first.

Shift Wizard Schedule should be used for all hourly employees who's schedules will be managed in Shift Wizard. It's recommended that you also work with a timekeeper to update Shift Wizard as needed.

Currently the only other option for scheduling is for salaried folks who will not be managed in shift wizard. (not applicable in this example)

The screenshot displays a task management interface. On the left, a list of tasks is shown under the heading 'All Items' (5 items). The tasks listed are:

- Assign Work Schedule for Data Change: Angel Hair - Registered Nurse\_1148.H** (Due: 12/04/2024)
- Complete Manager Internal Transfer** (Due: 12/03/2024, Tasks: Data Change: Angel Hair, Effective: 12/15/2024)
- Manager Offboarding Checklist: Terminate: Jelly Roll (Terminated)** (Due: 11/01/2024, Effective: 07/15/2024)
- End Additional Job: Amanda Wojczynski** (Due: 10/25/2024, Effective: 10/25/2024)
- Complete Manager New Hire Tasks: Hire: Tim Salek** (Due: 10/22/2024)

The main view shows the details for the 'Assign Work Schedule' task, which was created on 12/03/2024 and is due on 12/04/2024. The task details include:

- Worker:** Angel Hair
- Start Date:** 12/15/2024
- End Date:** MM/DD/YYYY
- Work Schedule Calendar:** Shift Wizard Schedule
- Current Work Schedule:** Shift Wizard Schedule
- enter your comment:** (empty text box)
- Process History:** Lisa Wilson (Due 12/04/2024) Assign Work Schedule - Awaiting Action

At the bottom of the task view, there are three buttons: 'Submit', 'Save for Later', and 'Cancel'.

STEP 27

Click on Submit

11/01/2024 ☆

d)

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10/25/2024 ☆

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sks: 10/22/2024 ☆



**Process History**

 **Lisa Wilson** Due 12/04/2024

Assign Work Schedule- Awaiting Action

**Submit**

Save for Later

Ca

## STEP 28

You will also receive a 'to do' for completing manager internal transfer tasks. Many of these to dos may not be applicable for this situation, complete as necessary, leave a comment and submit when you have finished all necessary tasks.

The screenshot displays a web application interface for a user named Lisa Wilson. The main content area shows a 'Complete To Do' task titled 'Complete Manager Internal Transfer Tasks'. The task details include:

- For:** Nursing Admin\_6100.2 (Lisa Wilson)
- Overall Process:** Data Change: Angel Hair
- Overall Status:** Successfully Completed
- Due Date:** 12/10/2024
- Instructions:**
  - 1) Submit Network User Form for New Hire: <https://tportal.mfbhosp.org/>
  - 2) Reach out to New Hire with Welcome Message
  - 3) Ensure New Hire workspace is ready
  - 4) Ensure New Hire has schedule for first week
  - 5) Complete other housekeeping items for New Hire (competency checklists, preparing team members, etc)
  - 6) Submit Workspace Request Form, if applicable, for additional space and/or relocation from an existing space: <https://app.amartabeet.com/h/form/ca7c1b6db83b46bcabc159f2bb56030b>

A comment box is present with the text: "no action needed, employee just decreased fte no other changes." The interface also shows a list of other tasks in the 'All Items' section, including 'ShiftWizard Data Audit Notification', 'Manager Offboarding Checklist', 'End Additional Job: Amanda Wojczynski', and 'Complete Manager New Hire Tasks'.

## STEP 29

In this example we updated the employee to a 'Shift Wizard Schedule', so workday prompts us to audit Shift Wizard and ensure necessary updates are made.

Note this will populate for assigned timekeepers for the sup org when applicable.

The screenshot displays a task management interface with the following components:

- My Tasks:** A sidebar on the left with a search icon and a list of task categories including "Items", "Advanced Searches", "Filters", "Archive", "Bulk Approve", and "Manage Delegations".
- All Items:** The main content area showing a list of 4 items. A search bar is present with the text "Search: All Items". Below the search bar is an "Advanced Search" link.
- Task List:**
  - ShiftWizard Data Audit Notification:** 12/03/2024 (highlighted with a red box). Subtitle: "Assign Work Schedule for Data Change: Angel Hair - Registered Nurse\_1148.H on 12/15/2024". Effective date: 12/15/2024.
  - Manager Offboarding Checklist:** 11/01/2024. Subtitle: "Terminate: Jelly Roll (Terminated)". Effective date: 07/15/2024.
  - End Additional Job: Amanda Wojczynski:** 10/25/2024.
- Complete To Do:** A section on the right with a "Shi" label and icons for a list and PDF. It includes details for a task: "For: Nursing Ad", "Overall Process: Data Chang", "Overall Status: Successfull", "Due Date: 12/10/2024", and "Instructions: Employee h and comple sure to take as necessa".
- Footer:** A text input field labeled "enter your comment".

## STEP 30

**Review the instructions, this tells us to refer to our notifications for more details.**

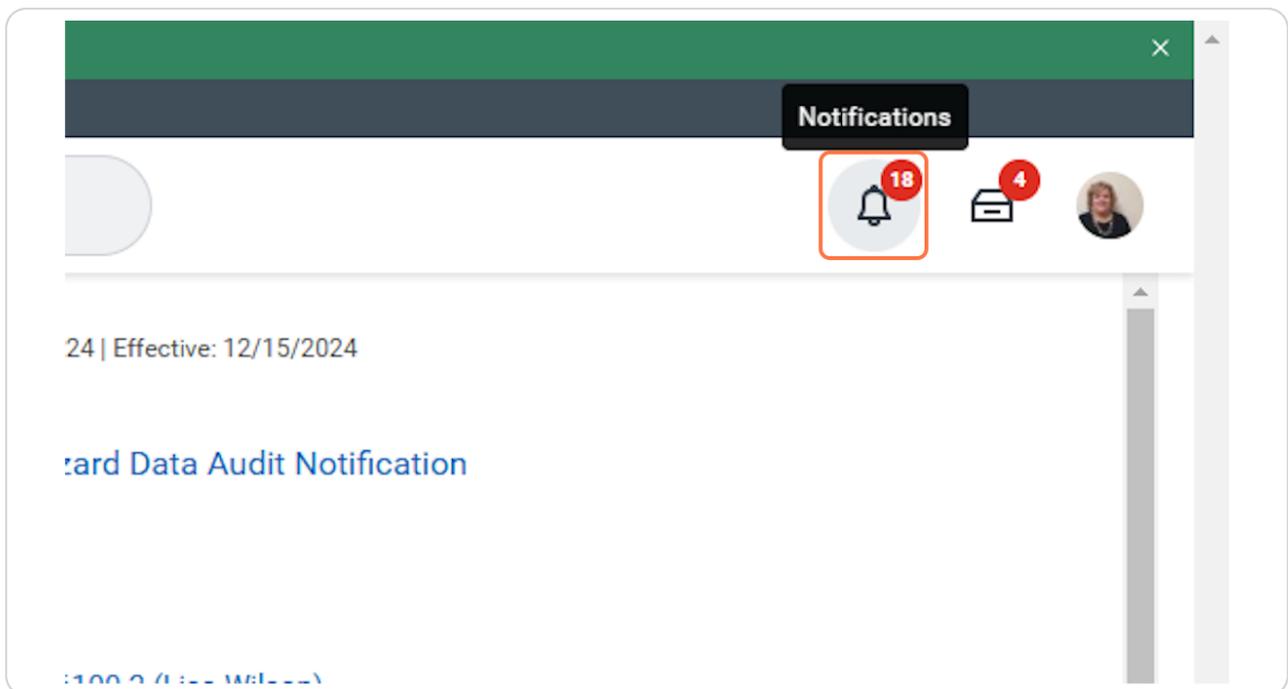
For	<a href="#">Nursing Admin_6100.2 (Lisa Wilson)</a>
Overall Process	<a href="#">Data Change: Angel Hair</a>
Overall Status	Successfully Completed
Due Date	12/10/2024
Instructions	Employee has an upcoming job change. Please refer to your notification for more details and complete this task once the ShfitWizard system has been updated. NOTE: Please be sure to take note of effective date and coordinate with employee's previous department/s as necessary.

enter your comment



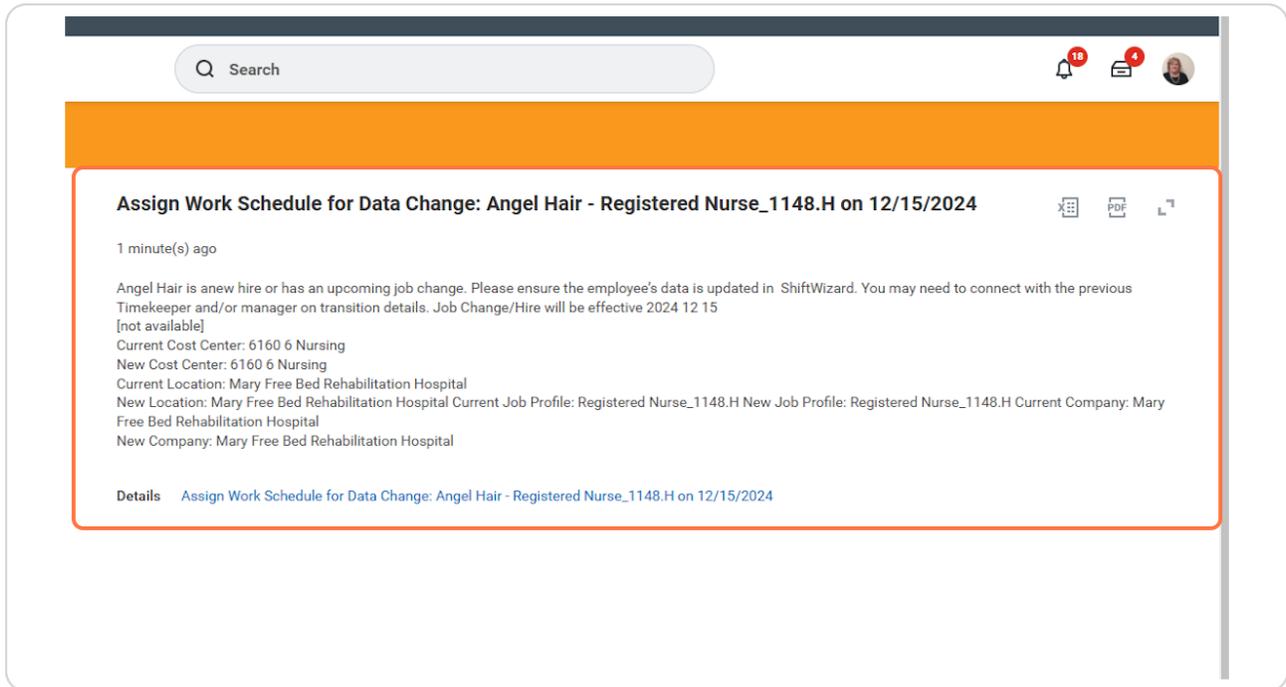
STEP 31

Click on the notifications bell.



## STEP 32

**See the notification instructions for data to audit in Shift Wizard. Make the necessary updates in Shift Wizard.**



The screenshot shows a notification in a Shift Wizard interface. At the top, there is a search bar with a magnifying glass icon and the text "Search". To the right of the search bar are three icons: a bell with a red notification badge, an envelope with a red notification badge, and a user profile picture. Below the search bar is a solid orange horizontal bar. The notification itself is contained within a white box with a thin orange border. The notification title is "Assign Work Schedule for Data Change: Angel Hair - Registered Nurse\_1148.H on 12/15/2024" in bold black text. To the right of the title are three icons: a list icon, a PDF icon, and a share icon. Below the title, the text "1 minute(s) ago" is displayed. The main body of the notification contains the following text: "Angel Hair is anew hire or has an upcoming job change. Please ensure the employee's data is updated in ShiftWizard. You may need to connect with the previous Timekeeper and/or manager on transition details. Job Change/Hire will be effective 2024 12 15 [not available]". Below this is a list of details: "Current Cost Center: 6160 6 Nursing", "New Cost Center: 6160 6 Nursing", "Current Location: Mary Free Bed Rehabilitation Hospital", "New Location: Mary Free Bed Rehabilitation Hospital Current Job Profile: Registered Nurse\_1148.H New Job Profile: Registered Nurse\_1148.H Current Company: Mary Free Bed Rehabilitation Hospital", and "New Company: Mary Free Bed Rehabilitation Hospital". At the bottom of the notification box, there is a "Details" link followed by the text "Assign Work Schedule for Data Change: Angel Hair - Registered Nurse\_1148.H on 12/15/2024".

## STEP 33

Click the radio button next the notification when all changes have been completed.

Pro tip: you can always navigate to hyperlinked details in the notification to find more details on the changes requested.

The screenshot shows a web application interface with a navigation bar at the top containing a menu icon, a 'Rehabilitation' tab, and a search bar. Below the navigation bar is a large orange header with the word 'Notifications' in white. Underneath the header, there are two dropdown menus: 'Viewing: All' and 'Sort By: Newest'. Below these is the text 'From Last 30 Days'. A list of notifications is displayed on the left side, with the first one highlighted by a red box. This notification is titled 'Assign Work Schedule for Data Change: Angel Hair - Registered Nurse\_1148.H on 12/15/2024' and includes the text 'ShiftWizard Data Audit Notification' and '4 minute(s) ago'. To the right of this notification is a radio button. Below the highlighted notification are three other notifications: 'Data Change: Angel Hair' (Change Job - Successfully Completed, 4 minute(s) ago), 'Expiring Time Off for Employees!' (2 day(s) ago), and 'Employee Fixed Term Contracts Expiring in 30 Days' (2 day(s) ago). Each of these three notifications has a radio button to its right. On the right side of the interface, there is a detailed view of the selected notification, titled 'Assign Work Schedule for Data Change: Ang'. It shows the time '4 minute(s) ago' and a message: 'Angel Hair is anew hire or has an upcoming job change. Please Timekeeper and/or manager on transition details. Job Change/f [not available]'. Below this message are several lines of text: 'Current Cost Center: 6160 6 Nursing', 'New Cost Center: 6160 6 Nursing', 'Current Location: Mary Free Bed Rehabilitation Hospital', 'New Location: Mary Free Bed Rehabilitation Hospital Current Jo Free Bed Rehabilitation Hospital', and 'New Company: Mary Free Bed Rehabilitation Hospital'. At the bottom of this detailed view, there is a 'Details' link followed by the text 'Assign Work Schedule for Data Change: Angel Hair - F'.