

How to Change Worker Location in Workday (Location ONLY)

Important: this process is NOT for changing for changing cost centers, this is only a situation in which location is changing but cost center is not changing.

For help with this process please contact hrworkday@maryfreebed.com

35 Steps [View most recent version](#) 

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Dec 03, 2024

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Dec 03, 2024

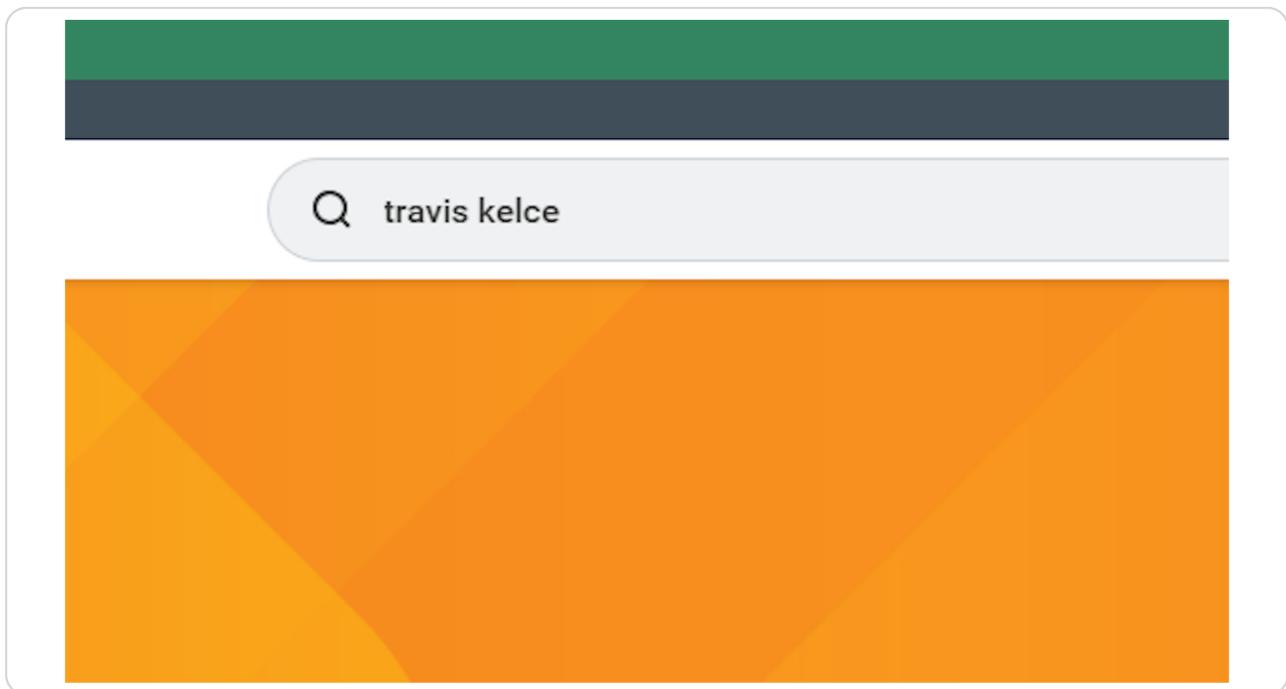
Submitting Change Location Request

18 Steps

STEP 1

Search for the employee for whom you are making the making location change. You can search by employee number as well.

Note: employees will populate by preferred name. Example) Elizabeth Smith may show as Liz Smith, always be sure to verify employee number prior to completing any employee change,



STEP 2

You can click enter to search a list, then click on the appropriate employees name OR you can select your employee form the list of selected results.

Note you can verify the employee's ID in the search preview, or by clicking on their name, and navigating to "Job" from the profile menu.

Optional Pro tip! You can click the 3 dots next any workday 'object' to see related action (see circled in orange next to Travis Kelce's name.) This button is aptly called the related actions button or fondly the 'twinkie' or 'lego', from here you can skip to step 4.

Simplified Search is Enabled

Top Results People (2) Tasks and Reports (0) All Categories ▾

People



Travis Kelce 

Employee
Program Manager_1136.S | OP Otsego_7371.1 (Christopher Hope) | Mary Free
Munson Healthcare - Charlevoix Hospital

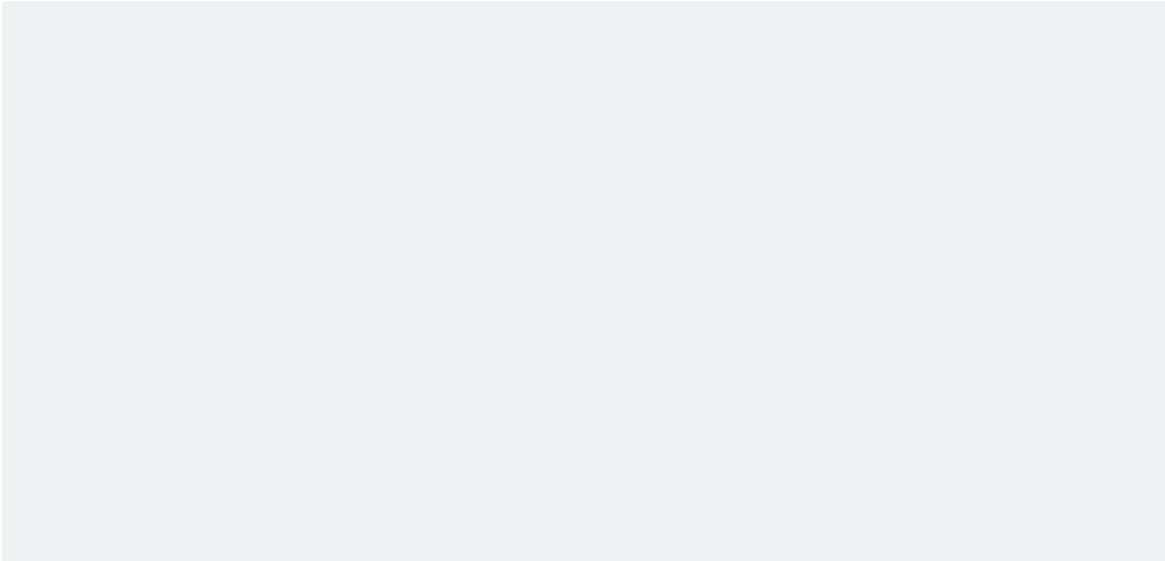
Employee ID	Local Time
100031	Tuesday 8:27 PM
Length of Service	Manager
0 year(s), 4 month(s), 6 day(s)	 Christopher Hope

STEP 3

On the employee's profile "Actions" to see a list of all related actions for worker.

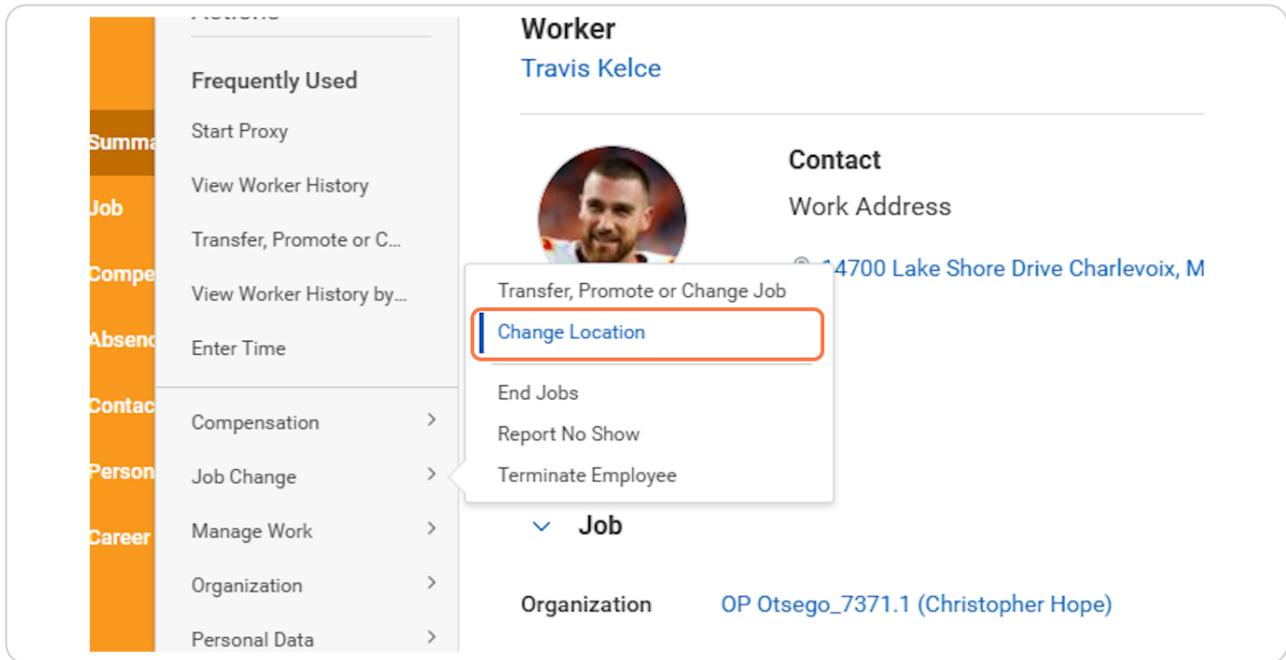
Position Title
Program Manager_1136.S

 **Supervisory Organization**
[OP Otsego_7371.1 \(Christopher Ho](#)



STEP 4

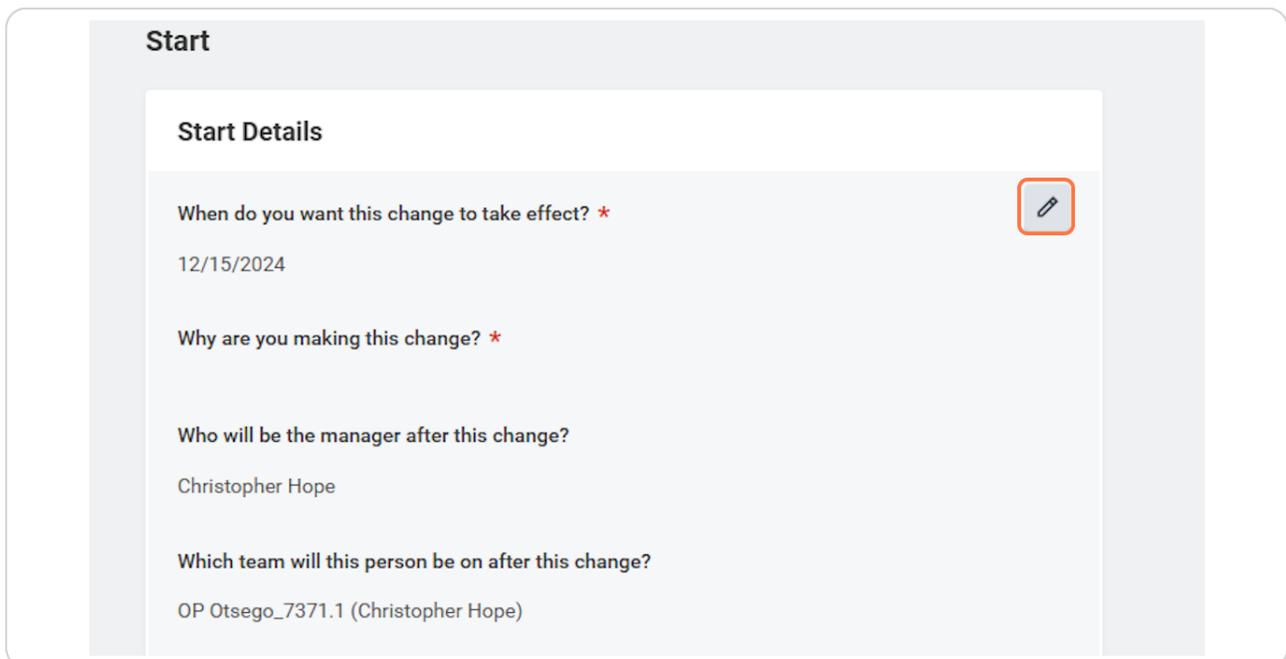
Hover over "Job Change" and select "Change Location"



The screenshot shows a worker profile for Travis Kelce. On the left, a navigation menu is visible with options like 'Frequently Used', 'Start Proxy', 'View Worker History', 'Transfer, Promote or C...', 'View Worker History by...', 'Enter Time', 'Compensation', 'Job Change', 'Manage Work', 'Organization', and 'Personal Data'. The 'Job Change' option is selected, and a dropdown menu is open, showing options: 'Transfer, Promote or Change Job', 'Change Location' (highlighted with a red box), 'End Jobs', 'Report No Show', and 'Terminate Employee'. The worker's profile includes a photo, name, and contact information: 'Work Address' and '14700 Lake Shore Drive Charlevoix, M'. The organization is listed as 'OP Otsego_7371.1 (Christopher Hope)'.

STEP 5

Click on pencil in the top right of the task, to edit the information.



The screenshot shows the 'Start Details' form for a job change. The form includes the following fields:

- When do you want this change to take effect? *** (Date field): 12/15/2024. A pencil icon is highlighted in the top right corner of this field.
- Why are you making this change? *** (Text field)
- Who will be the manager after this change?** (Text field): Christopher Hope
- Which team will this person be on after this change?** (Text field): OP Otsego_7371.1 (Christopher Hope)

STEP 6

Enter the appropriate effective date.

Note: by changing workday's defaulted date it will 'uncheck' "Do you want to use the next pay period?"

Important Process Improvement: Job Changes are not longer limited to pay period begin dates, however workday will default to the next pay period, you may select the accurate date in which the location change took place.

Start

Start Details

When do you want this change to take effect? *

12/15/2024 

Why are you making this change? *

Do you want to use the next pay period?

Who will be the manager after this change?

Christopher Hope

STEP 7

Click on Submenu for "Why are you making this change"> Select "Data Changes"

When do you want this change to take effect? *

12/03/2024 

Why are you making this change? *

- Search 
- Data Changes** 
- Transfer 

Who will be the manager after this change?

Christopher Hope

Which team will this person be on after this change?

OP Otsego_7371.1 (Christopher Hope)

STEP 8

Select "Change Location"

IMPORANT: to stress again, this process is for location change ONLY, if you need to change other details like decrease FTE, change cost center, or compensation change, you must refer to the "All other Job Change" or other applicable SOP.

12/03/2024 

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?

OP Otsego_7371.1 (Christopher Hope)

Where will this person be located after this change? *

▼ Mary Free Bed at Munson 

STEP 9

Click in the text box for "Where will this person be located after this change?..."

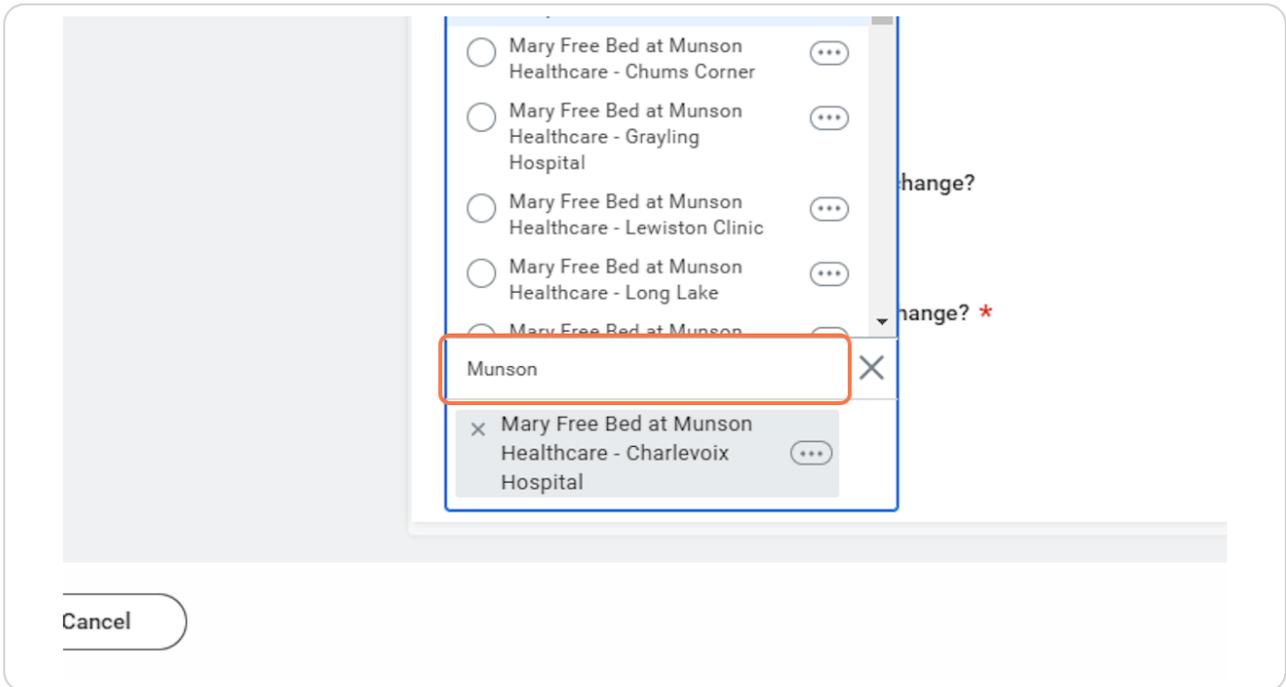
The screenshot shows a form with the following fields:

- Why are you making this change? ***
A dropdown menu with the selected option "Change Location".
- Do you want to use the next pay period?**
An unchecked checkbox.
- Who will be the manager after this change?**
Text input: "Christopher Hope".
- Which team will this person be on after this change?**
Text input: "OP Otsego_7371.1 (Christopher Hope)".
- Where will this person be located after this change? ***
A dropdown menu with the selected option "Mary Free Bed at Munson Healthcare - Charlevoix Hospital". This field is highlighted with a red border.

At the bottom left of the form is a "Cancel" button.

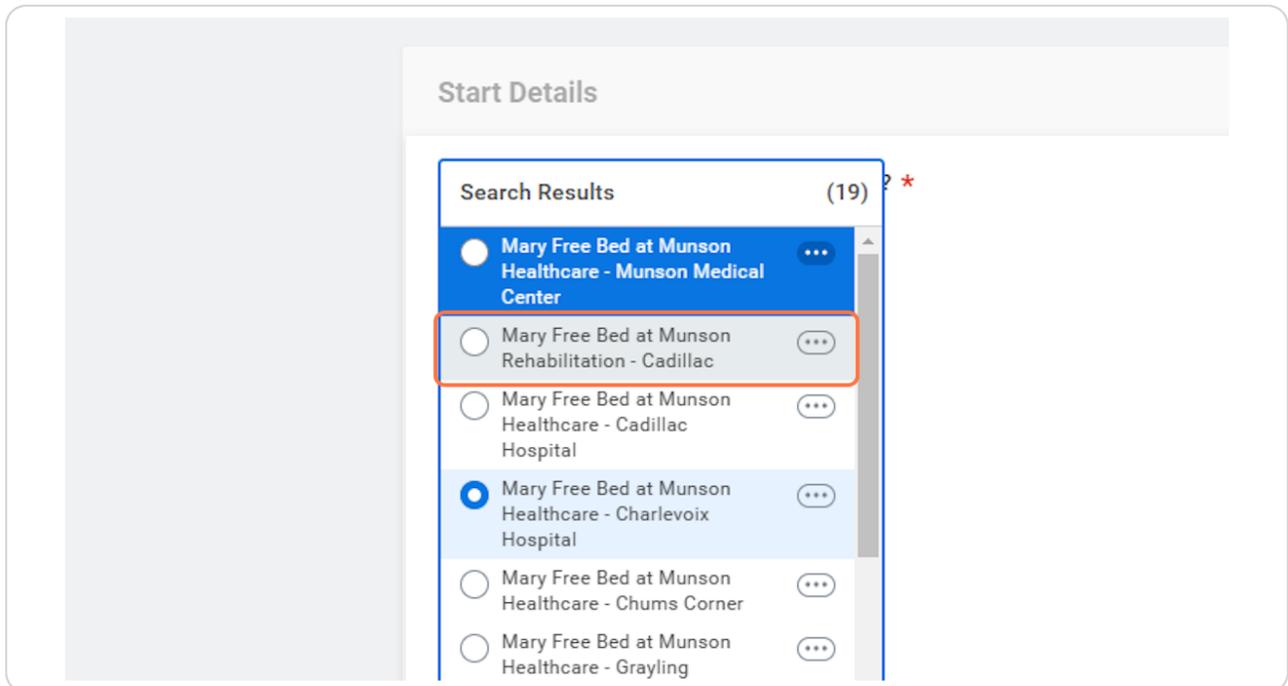
STEP 10

Search for a primary word in your location, for example "Munson" to pull all locations with "Munson" included in their name.



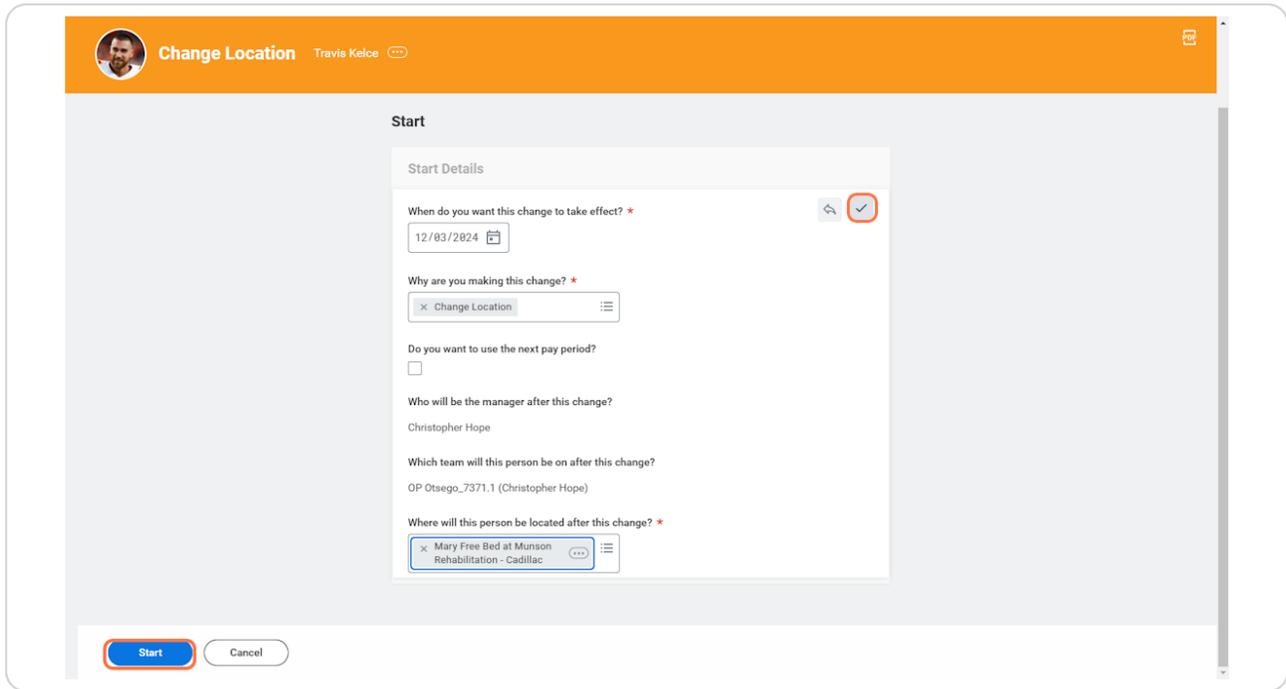
STEP 11

Click on the radio button next to the new location for the worker.



STEP 12

Click on Check mark, to save your selections or click "Start" in the bottom left corner.



The screenshot shows a web interface for changing a location. At the top, there is an orange header with a profile picture, the text "Change Location", the name "Travis Kelce", and a menu icon. Below the header, the main content area is titled "Start" and contains a "Start Details" form. The form has several sections: "When do you want this change to take effect? *" with a date field set to "12/03/2024" and a checkmark icon; "Why are you making this change? *" with a dropdown menu showing "Change Location"; "Do you want to use the next pay period?" with an unchecked checkbox; "Who will be the manager after this change?" with the text "Christopher Hope"; "Which team will this person be on after this change?" with the text "OP Otsego_7371.1 (Christopher Hope)"; and "Where will this person be located after this change? *" with a dropdown menu showing "Mary Free Bed at Munson Rehabilitation - Cadillac". At the bottom left of the form, there are two buttons: "Start" (highlighted with a red border) and "Cancel".

STEP 13

Note the workers new location is showing, no changes should to be made to weekly hours in this process. You can click "Next"

The screenshot shows a web application interface for a 'Change Job' process. The browser address bar indicates the URL is 'Implementation - maryfreebed2'. The user is logged in as 'Travis Kelce'. The page title is 'Change Job' and the user's name 'Travis Kelce' is displayed. A progress bar on the left shows the current step is 'Location'. The 'Location' section is highlighted with a red box and contains the following details:

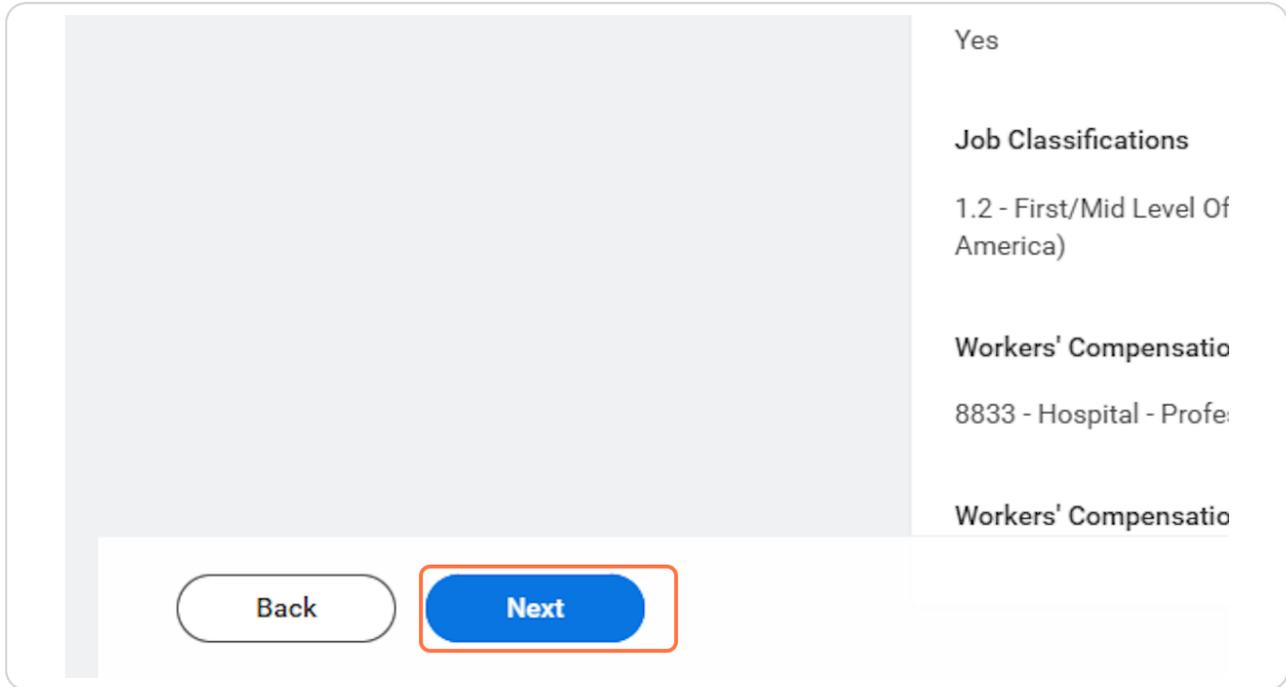
- Location Details**
- Location ***: Mary Free Bed at Munson Rehabilitation - Cadillac
- Scheduled Weekly Hours**: 40
- Work Shift**: Work Shift

At the bottom of the form, there are two buttons: 'Back' and 'Next'. The 'Next' button is highlighted with a red box, indicating it is the next step in the process.

STEP 14

Click Next.

No changes are allowed to be made in the administrative section, again please refer to the appropriate SOP for any other job changes that may need to be made. This process is for change location only.



The screenshot shows a software interface with a large grey rectangular area on the left side. To the right of this area, there is a list of text items: "Yes", "Job Classifications", "1.2 - First/Mid Level Of America)", "Workers' Compensatio", "8833 - Hospital - Profe:", and "Workers' Compensatio". At the bottom of the interface, there are two buttons: "Back" and "Next". The "Next" button is highlighted with a red rectangular border.

STEP 15

Click on **Select files to upload a document.**

Note: A document must be attached to ALL job change requests. In a situation like "Change Location" we do not necessarily need documentation, so you can submit a brief summary of why the change is being made. For example in a word document you could write "Travis Kelce has decided to move to the beautiful town of Cadillac, MI full time as he has retired from KC Chiefs"

Note for other types of Job Changes, we may require you to attach offer letters and/or VP approvals.

ents

Drop files here

or

Select files

Submit Save for Later Cancel

STEP 16

Once you have selected your file for upload, you must select a category. For all Job Change, including Change Location, please select "Offer"

The screenshot shows a web form for job change. A dropdown menu is open, displaying a list of categories. The 'Offers' option is highlighted with a red border. The form includes fields for 'enter your comment', 'Attachments' (with a PDF file 'ECF example-10...' successfully uploaded), 'Description', and 'Category' (with a search bar). The 'Upload' button is visible at the bottom. The background shows job classification details: 'Job Classifications', '1.2 - First/Mid Level Officials and Managers (EEO-1 Job Categories-United States of America)', '1.3 - Hospital - Professional Employees (United States of America)', and 'Compensation Code Override'.



Error Warning!! If you try to submit this process without an attachment the system will give you 'hard stop' error. You must attach a document to continue this process.

STEP 17

Click on Submit

PDF ECF example-10_0_2024.pdf
✓ Successfully Uploaded!

Description

Category *

Upload

Submit Save for Later Cancel

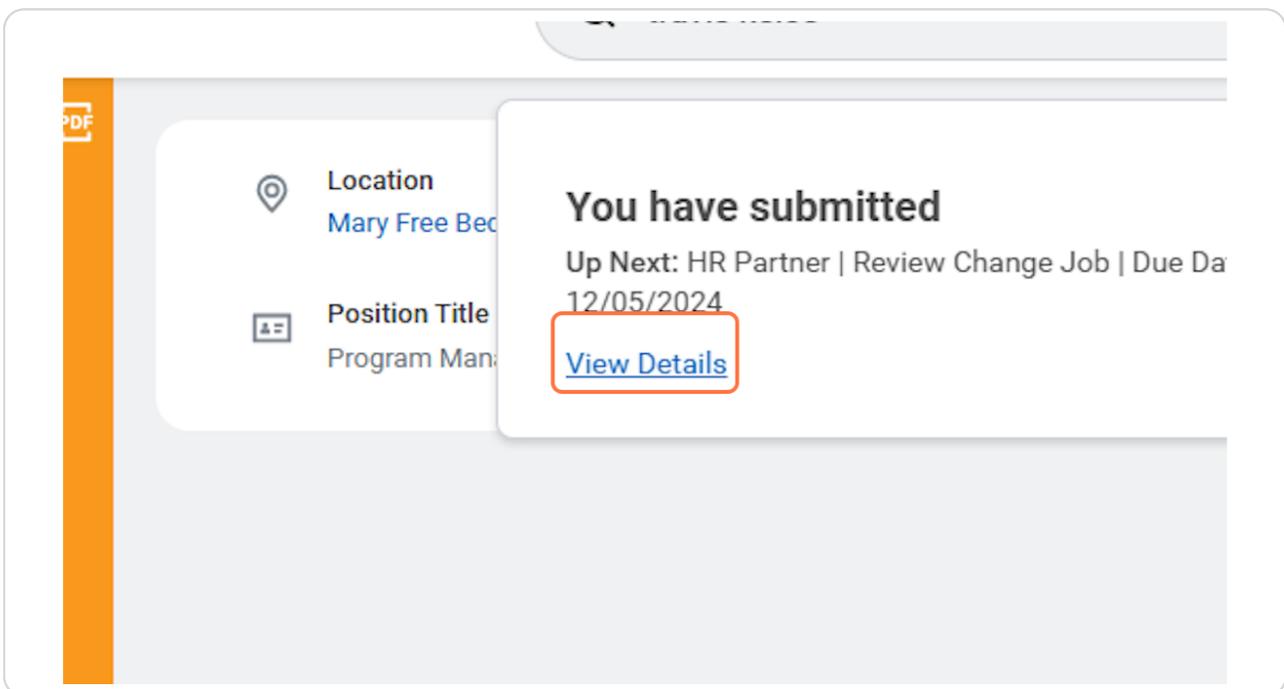
STEP 18

You have now submitted your change location request. We can see in the pop up that the "HR Partner" is up next in the business process (BP)

You will receive a next step task in your workday inbox once the HR partner has approved your Location Change. (STEP 23)

While you wait for approval you can move on to other tasks, log out of workday, or to view the next steps in the process, click "View Details" in the pop-up that appears to view more information about the BP.

Pro tip! If you navigate away from this screen you can always come back to a process by navigating to the worker profile, clicking on "actions">"Worker history">"View Worker History" to see all Business processes and their statuses.



Optional: View current process steps, who's up...

4 Steps

STEP 19

(Optional) Click on the drop down arrow next to Details and Process

Up Next

HR Partner

Review Change Job

Due Date 12/05/2024

 **Details and Process**

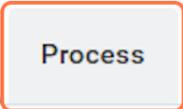
STEP 20

(Optional) Click on Process tab.

Overall Process [Data Change: Travis Kelce](#)

Overall Status In Progress

Due Date 12/10/2024

[Details](#)  **Process**

 View Details

▼ **Attachments**

STEP 21

(Optional) Here we can see the full process history, view which people have been assigned the next steps in the process, and navigate to the remaining steps,

in this example we see HR Partner has been assigned next steps, and which people are assigned the role 'HR Partner'

Due Date 12/10/2024

Details **Process**

Process History 8 items

Process	Step	Status	Completed On	Due Date	Person (Up to 5)	All Persons	Comment
Change Job	Change Job	Step Completed	12/03/2024 08:30:39 PM	12/10/2024	Christopher Hope	1	
Change Job	Review: Current Manager	Not Required		12/10/2024		0	
Change Job	Review: Receiving Manager	Not Required		12/10/2024		0	
Change Job	Review Change Job	Awaiting Action	Change Job	12/05/2024	Alexus Brandenburg (Proposed HR Partner) (***)	7	
					Chelsea Belmer (Proposed HR Partner)		
					Dawn Boomers (Proposed HR Partner)		
					Hannah Heisler (Proposed HR Partner)		
					Kolton Pavicek (Proposed HR Partner)		

Remaining Process
Click on the button below to review remaining process details.

Remaining Process

Done

STEP 22

(Optional) Click on Remaining Process to view upcoming steps in the BP.

Remaining Process

Click on the button below to review remaining process details.

Remaining Process

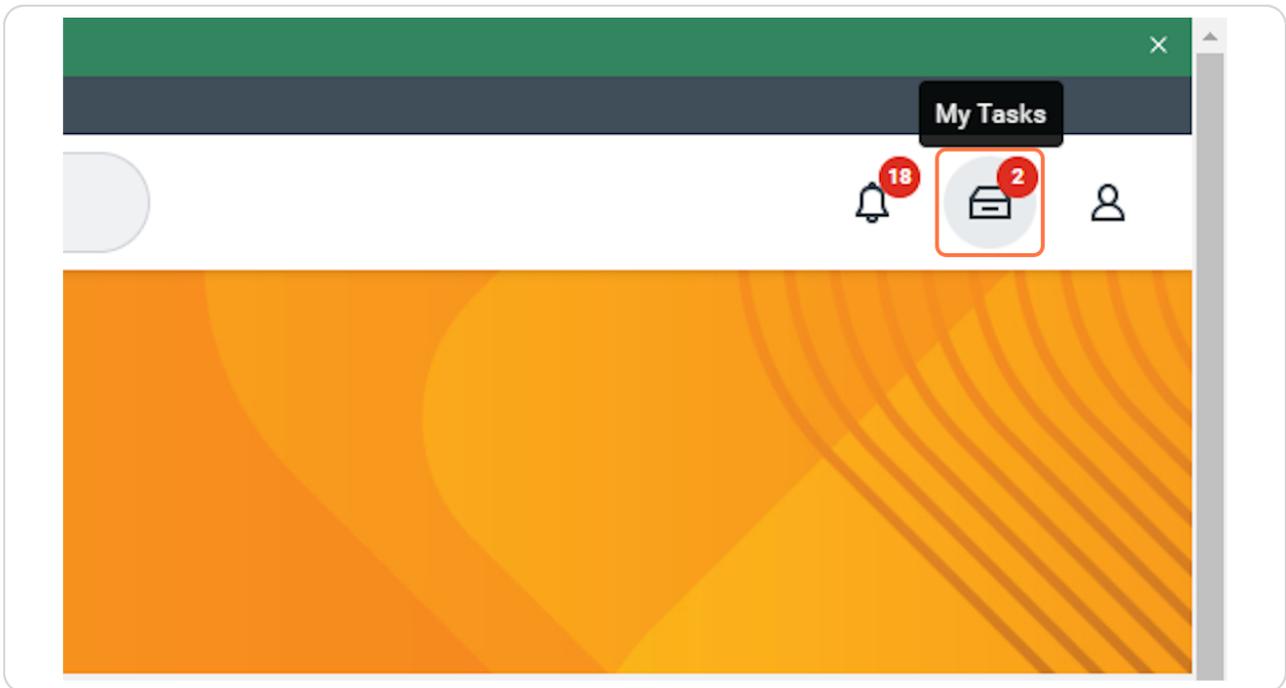
Done

Completing to-dos after HR Partner Approves...

6 Steps

STEP 23

Click on your workday inbox in the top right corner of your workday window.



STEP 24

Note you will have some to-dos after HR Approves.

You may not need to make any changes, complete any applicable to-dos, then click submit. Comments are encouraged for documentation history!

The screenshot displays a HR system interface. On the left is a sidebar with navigation options: "Advanced Searches", "Filters", "Archive", "Click Approve", and "Manage Delegations". The main content area shows a list of tasks under the heading "Advanced Search".

Task	Date	Star
Assign Work Schedule for Data Change: Travis Kelce - Program Manager_1136.S	12/03/2024	☆
Complete Manager Internal Transfer Tasks: Data Change: Travis Kelce	12/03/2024	☆

The second task, "Complete Manager Internal Transfer Tasks: Data Change: Travis Kelce", is highlighted with a red border. Below the task title, it shows "Due: 12/05/2024" and "Effective: 12/03/2024".

On the right side of the interface, there are several fields and sections:

- Worker:** Travis Kelce
- Start Date:** 12/03/2024 (marked with a red asterisk)
- End Date:** 12/03/2024 (marked with a red asterisk)
- Work Schedule Calendar:** Full (marked with a red asterisk)
- Current Work Schedule:** Full
- Comments:** A text box with the placeholder "enter your comment" and a blue cloud icon.
- Process History:** A list showing "Christopher Hope" performed the action "Assign Work Schedule- Aw".

STEP 25

Complete Manager Internal Transfer Tasks (automatically triggers for all Job Change Types) and Click "Submit" once applicable tasks are completed.

complete any and all applicable to-dos, though some may not be applicable to 'change location.' As HR iterates workday and our BPs, HR will refine our to dos to more specifically to fit the Job Change type submitted.

The screenshot displays a task management application interface. On the left, a sidebar shows a list of tasks under the heading 'All Items'. Two tasks are visible:

- Assign Work Schedule for Data Change: Travis Kelce - Program Manager_1136.S** (Due: 12/04/2024)
- Complete Manager Internal Transfer Tasks: Data Change: Travis Kelce** (Due: 12/05/2024, Effective: 12/03/2024)

The right pane shows a detailed view of the selected task, 'Complete Manager Internal Transfer Tasks'. The task details include:

- Created:** 12/03/2024 | **Due:** 12/05/2024 | **Effective:** 12/03/2024
- Complete To Do:** Complete Manager Internal Transfer Tasks
- For:** OP Otsego_7371.1 (Christopher Hope)
- Overall Process:** Data Change: Travis Kelce
- Overall Status:** Successfully Completed
- Due Date:** 12/10/2024
- Instructions:**
 - 1) Submit Network User Form for New Hire: <https://itportal.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.smartsheet.com/b/form/ca7c1b6db83b46bcabc159f2bb56030b>

At the bottom of the task view, there is a comment field labeled 'enter your comment' with a text input box and a 'Submit' button.

STEP 26

For Change Location, you should not be changing an employee's work schedule, however updates to other systems like Shift Wizard may need to take place for hourly individuals.

Note on Shift Wizard: If your employee's schedule should be managed in shift wizard, please select "Shift Wizard" from the workday schedule calendar, this will automatically populate a task to the timekeeper assigned to the employee's organization to update any necessary information in Shift Wizard.

Assign work Schedule

Worker Travis Kelce

Start Date * 12/03/2024 

End Date MM/DD/YYYY 

Work Schedule Calendar * × Full Time Salaried Staff 8 Hour Shift 

Current Work Schedule Full Time Salaried Staff 8 Hour Shift

enter your comment 

Process History



Important: If no changes need to be made you can click the "gear" icon at the top of the task and select "Skip"

STEP 27

Enter any applicable comments for documentation purposes. Comments are encouraged for historical reference. Click submit.

The screenshot displays a web application interface for assigning a work schedule. The interface is divided into several sections:

- Header:** Includes a search bar and user profile information.
- Left Sidebar:** Contains navigation options such as "My Tasks", "All Items", "Saved Searches", "Filters", "Archive", "Bulk Approve", and "Manage Delegations".
- Main Content Area:**
 - Assign Work Schedule:** The primary section, showing details for a worker named Travis Kelce. It includes fields for "Start Date" (12/03/2024) and "End Date" (MM/DD/YYYY). The "Work Schedule Calendar" is set to "Full Time Salaried Staff 8 Hour Shift".
 - Current Work Schedule:** Displayed as "Full Time Salaried Staff 8 Hour Shift".
 - Comment Section:** A text input field labeled "enter your comment" with the text "no changes" entered. This field is highlighted with a red border.
 - Process History:** Shows a task assigned to Christopher Hope, due 12/04/2024, with the status "Assign Work Schedule - Awaiting Action".
- Bottom:** Features three buttons: "Submit", "Save for Later", and "Cancel".

STEP 28

Click on Submit

enter your comment

no changes|

Process History

 **Christopher Hope** Due 12/04/2024
Assign Work Schedule- Awaiting Action

Submit Save for Later Cancel

Review Changes

4 Steps

You have now completed the Business Process for change location, no further action is required.

The below steps show you how to view the changes made. Note that future changes will only show under Actions>Worker History>View Worker History until the effective date of the change has arrived.

STEP 29

Navigate to the worker's profile.

Top Results People (2) Tasks and Reports (0) A

People

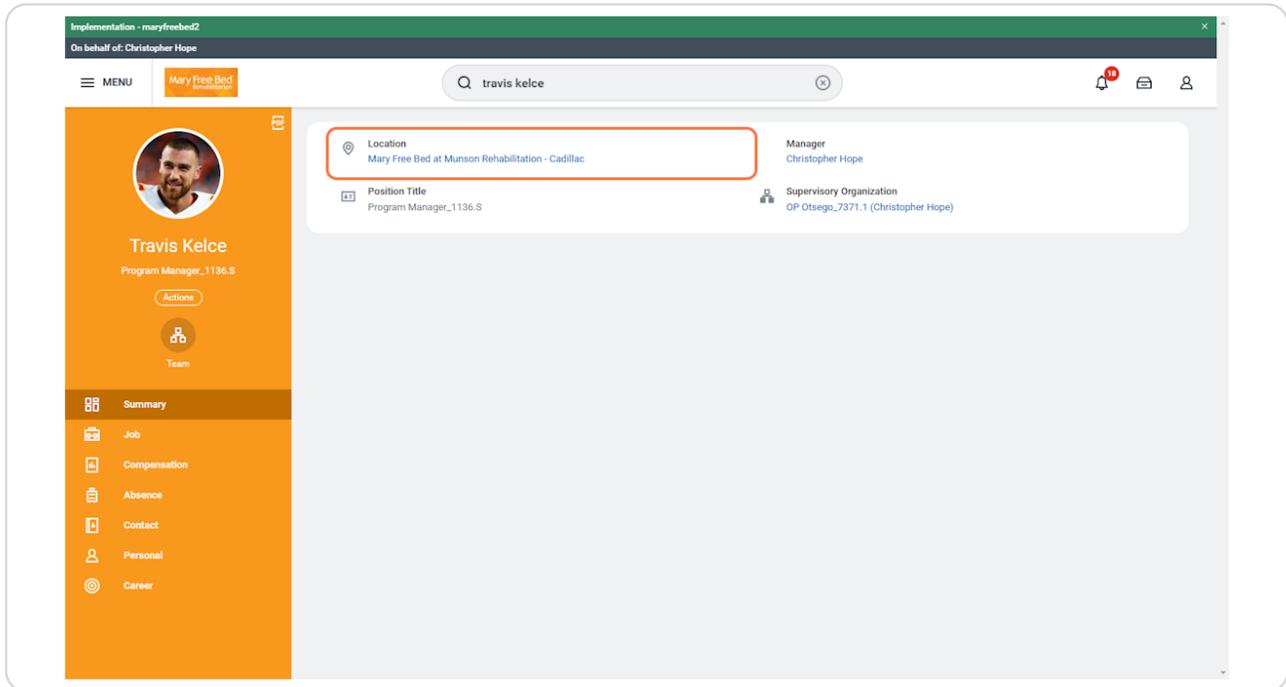


Travis Kelce ...
Employee
Program Manager_1136.S | OP Otsego_7371.
Munson Rehabilitation - Cadillac

Employee ID 100031	Local Tir Tuesday
-----------------------	----------------------

STEP 30

On the worker's main summary page, you should see the new location as long as the effective date has come to pass.



The screenshot shows a web application interface for a worker's profile. The browser address bar displays "Implementation - maryfreebed2" and "On behalf of: Christopher Hope". The search bar contains "travis kelce". The profile card on the left identifies the worker as Travis Kelce, Program Manager_1136.S, with an "Actions" button and a "Team" link. The main content area shows job details: Location (Mary Free Bed at Munson Rehabilitation - Cadillac), Manager (Christopher Hope), Position Title (Program Manager_1136.S), and Supervisory Organization (OP Otsego_7371.1 (Christopher Hope)). A left-hand navigation menu includes Summary, Job, Compensation, Absence, Contact, Personal, and Career.

STEP 31

You should also be able to view the location on the worker's Job page

The screenshot displays a user profile for Travis Kelce, Program Manager_1136.S. The left sidebar contains navigation options: Summary, Job, Compensation, Absence, Contact, Personal, and Career. The main content area is divided into two sections: Job Details and Contact Information - Public. The Job Details section lists various attributes such as Employee ID, Supervisory Organization, Position, Business Title, Job Profile, Job Family, Employee Type, Management Level, Time Type, FTE, Location, Hire Date, Original Hire Date, Continuous Service Date, Length of Service, Time in Position, and Time in Job Profile. The Contact Information - Public section shows the Work Address: 704 Oak Street Cadillac, MI 49601 United States of America. A red box highlights the Location field in the Job Details section, which contains the text: Mary Free Bed at Munson Rehabilitation - Cadillac.

Job Details	
Employee ID	100031
Supervisory Organization	Mary Free Bed (Kent Riddle) >> OP Otsego_7371.1 (Christopher Hope)
Position	Program Manager_1136.S
Business Title	Program Manager_1136.S
Job Profile	Program Manager_1136.S
Job Family	Management Group > Management
Employee Type	Regular
Management Level	Manager
Time Type	Full time
FTE	100.00%
Location	Mary Free Bed at Munson Rehabilitation - Cadillac
Hire Date	07/27/2024
Original Hire Date	07/27/2024
Continuous Service Date	07/27/2024
Length of Service	0 year(s), 4 month(s), 6 day(s)
Time in Position	0 year(s), 4 month(s), 6 day(s)
Time in Job Profile	0 year(s), 4 month(s), 6 day(s)

Contact Information - Public	
Work Address	704 Oak Street Cadillac, MI 49601 United States of America

STEP 32

Note the work address is also visible on this page.

This close-up screenshot shows the 'Contact Information - Public' section. The 'Work Address' is listed as '704 Oak Street Cadillac, MI 49601 United States of America'. A red box highlights this information. The number '1' is visible in the bottom left corner of the screenshot area.

How to View Worker History

3 Steps

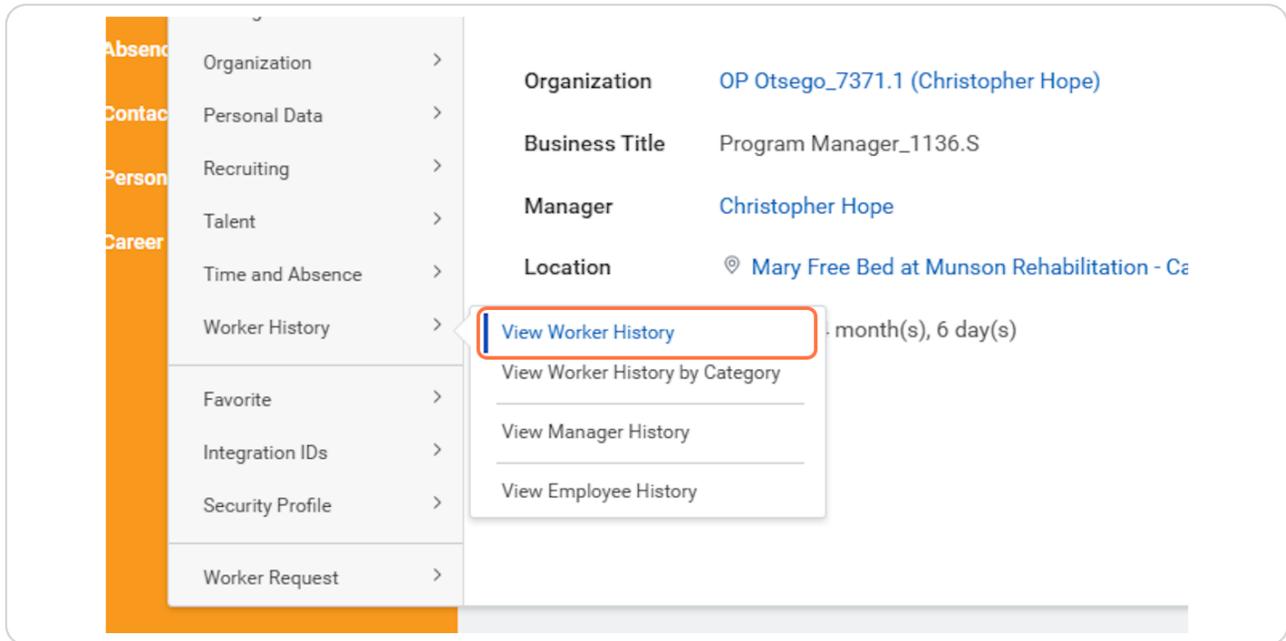
STEP 33

Click on Actions

The screenshot displays an employee profile interface. On the left, a profile card for Travis Kelce is shown with an orange background. It includes a circular profile picture at the top, the name 'Travis Kelce', and the title 'Program Manager_1136.S'. A red-bordered button labeled 'Actions' is highlighted. Below the card is a 'Team' icon. At the bottom left of the card is a 'Summary' icon. On the right, a sidebar lists the following fields: Employee ID, Supervisory Organization, Position, Business Title, Job Profile, Job Family, and Employee Type.

STEP 34

Click on View Worker History



STEP 35

Here you can see a list of all previous data changes/work history changes made to the worker and their status.

