

Transferring Workers to a different Manager

This process will walk you through how to transfer an employee to a new manager, this should only be used when an employee is moving managers (and possibly locations) but NOT moving cost centers or other job change details.

To update multiple job details at once please refer to the All Other Job Change process.

42 Steps [View most recent version](#) 

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

Current (sending) Manager Tasks

21 Steps

STEP 1

Search for your worker and select the worker object.

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

People



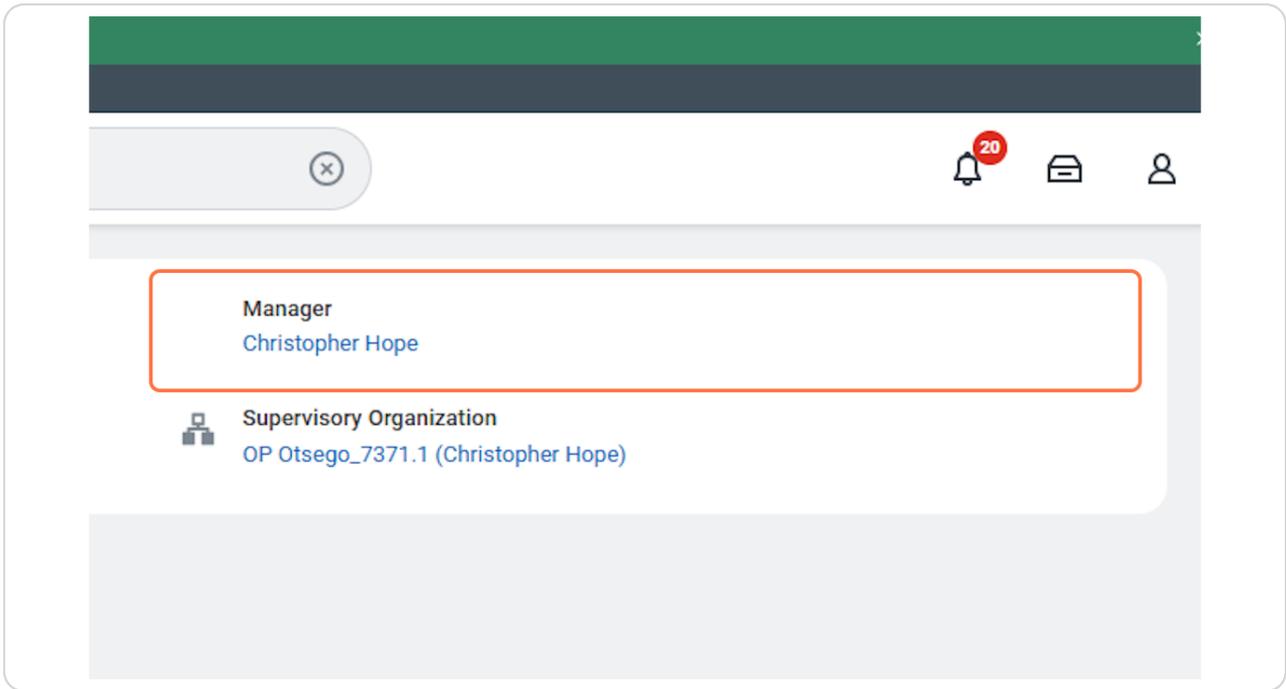
Trav Swift-Kelce 

Employee
Program Manager_1136.S | OP Otsego_7371.1 (C
Munson Rehabilitation - Cadillac

Employee ID	Local Time
100031	Wednesday 1

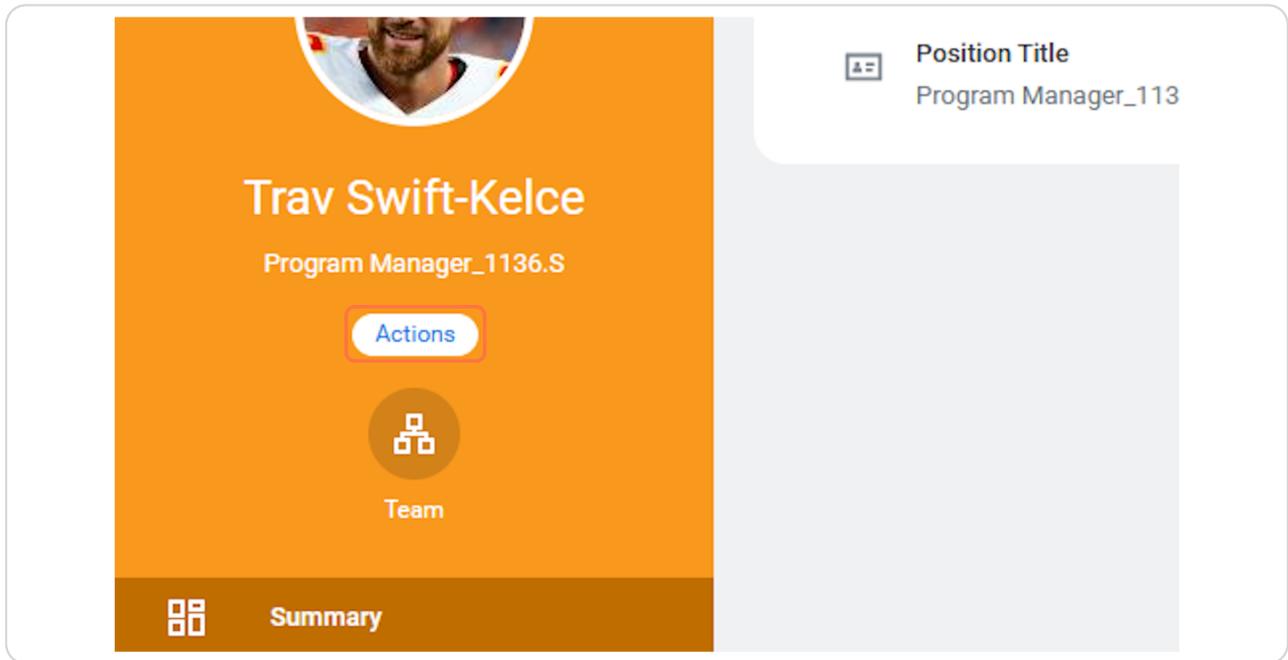
STEP 2

Note the current manager, only the current manager can initiate this transfer process.



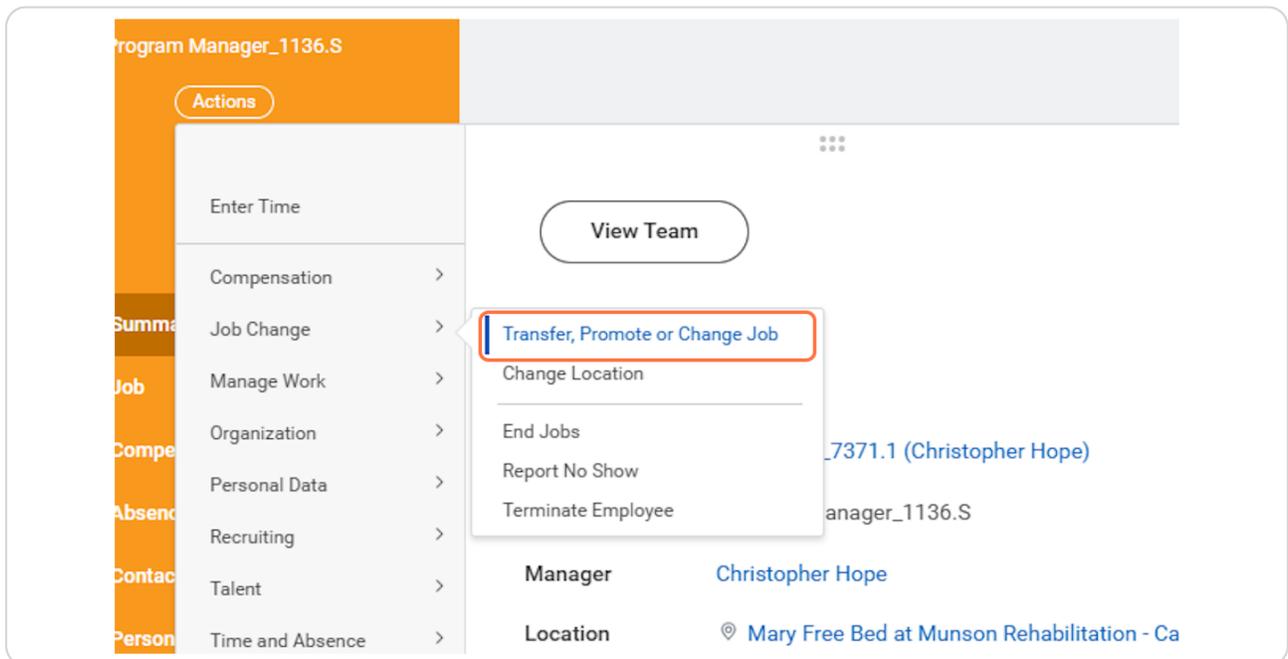
STEP 3

Click on Actions



STEP 4

Hover over Job Change and Click on Transfer, Promote or Change Job



STEP 5

Click on the edit pencil or click on the object you need update.

MENU Mary Free Bed

travis kelce

Change Job Trav Swift-Kelce

Start

Start Details

When do you want this change to take effect? *

12/15/2024

Why are you making this change? *

Who will be the manager after this change?

Christopher Hope

Which team will this person be on after this change?

OP Oteago_7371.1 (Christopher Hope)

Where will this person be located after this change? *

Mary Free Bed at Munson Rehabilitation - Cadillac

Do you want to use the next pay period?

Yes

Start Cancel

STEP 6

Select the appropriate effective date for this change.

Job Trav Swift-Kelce

Start

Start Details

When do you want this change to take effect? *

01/12/2025

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

For a manager change you will select Transfer > Move to another Manager

For location change only, please refer to 'Location Change', for a combination of changes please refer to "All other job changes"

When do you want this change to take effect? *

01/12/2025 📅

Why are you making this change? *

Search ☰

← Transfer

Move to Another Manager

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

Search and select the new manager.

Search results (3)

<input checked="" type="checkbox"/>	 Tricia Wing Program Director Munson Medical Center Out_8352.1 ⋮
<input type="checkbox"/>	 Jaeden Wang Nutrition Services Representative Nursing Admin_6100.3 ⋮
<input type="checkbox"/>	Ralph Wang Physician Executive - Medical_8200.3 ⋮

wing ×

× Christopher Hope ⋮

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? *

STEP 9

Note by selecting a new manager you have automatically updated the Supervisory Organization.

01/12/2025

Why are you making this change? *

× Move to Another Manager

Do you want to use the next pay period?

Who will be the manager after this change?

× Tricia Wing

Which team will this person be on after this change?

× MFB OP Cadillac_7368.1 (Tricia Wing)

Where will this person be located after this change? *

× Mary Free Bed at Munson Rehabilitation - Cadillac

Cancel

The screenshot shows a form for updating a person's details. The 'Which team will this person be on after this change?' field is highlighted with a red border. The form includes a date field, a dropdown for the reason, a checkbox for the next pay period, a dropdown for the new manager, a dropdown for the new team, and a dropdown for the new location. A 'Cancel' button is located at the bottom left.

STEP 10

You can update a location during this process if applicable BUT you cannot update cost center.

If cost center needs to be updated please stop this process and use "All Other Job Changes" process instructions.

The screenshot shows a form for updating a job change. It contains the following sections:

- Why are you making this change? ***
A dropdown menu with the selected option: "Move to Another Manager".
- Do you want to use the next pay period?**
An unchecked checkbox.
- Who will be the manager after this change?**
A dropdown menu with the selected option: "Tricia Wing".
- Which team will this person be on after this change?**
A dropdown menu with the selected option: "MFB OP Cadillac_7368.1 (Tricia Wing)".
- Where will this person be located after this change? ***
A dropdown menu with the selected option: "Mary Free Bed at Munson Rehabilitation - Cadillac". This section is highlighted with a red border.

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

STEP 11

Review your changes.

The screenshot shows a web interface for changing a job. At the top, there is an orange header with a profile picture, the text "Change Job", and the name "Trav Swift-Kelce". Below the header is a "Start" section containing a "Start Details" form. The form has several fields:

- When do you want this change to take effect? ***: A date picker showing "01/12/2025" with a calendar icon and a checkmark icon.
- Why are you making this change? ***: A dropdown menu with the selected option "Move to Another Manager".
- Do you want to use the next pay period?**: An unchecked checkbox.
- Who will be the manager after this change?**: A dropdown menu with the selected option "Tricia Wing".
- Which team will this person be on after this change?**: A dropdown menu with the selected option "MFB OP Cadillac_7368.1 (Tricia Wing)".
- Where will this person be located after this change? ***: A dropdown menu with the selected option "Mary Free Bed at Munson Rehabilitation - Cadillac".

At the bottom of the form, there are two buttons: a blue "Start" button and a white "Cancel" button. The "Start" button is highlighted with a red border.

STEP 12

Click on Start

This is a close-up view of the bottom of the form from Step 11. It shows two buttons: a blue "Start" button and a white "Cancel" button. The "Start" button is highlighted with a red border. To the right of the buttons, there is a list of text fragments from the form above, including "which team will this", "MFB OP Cadillac_7368.1", "Where will this persc", "Mary Free Bed at Mu", and "Do you want to use t".

STEP 13

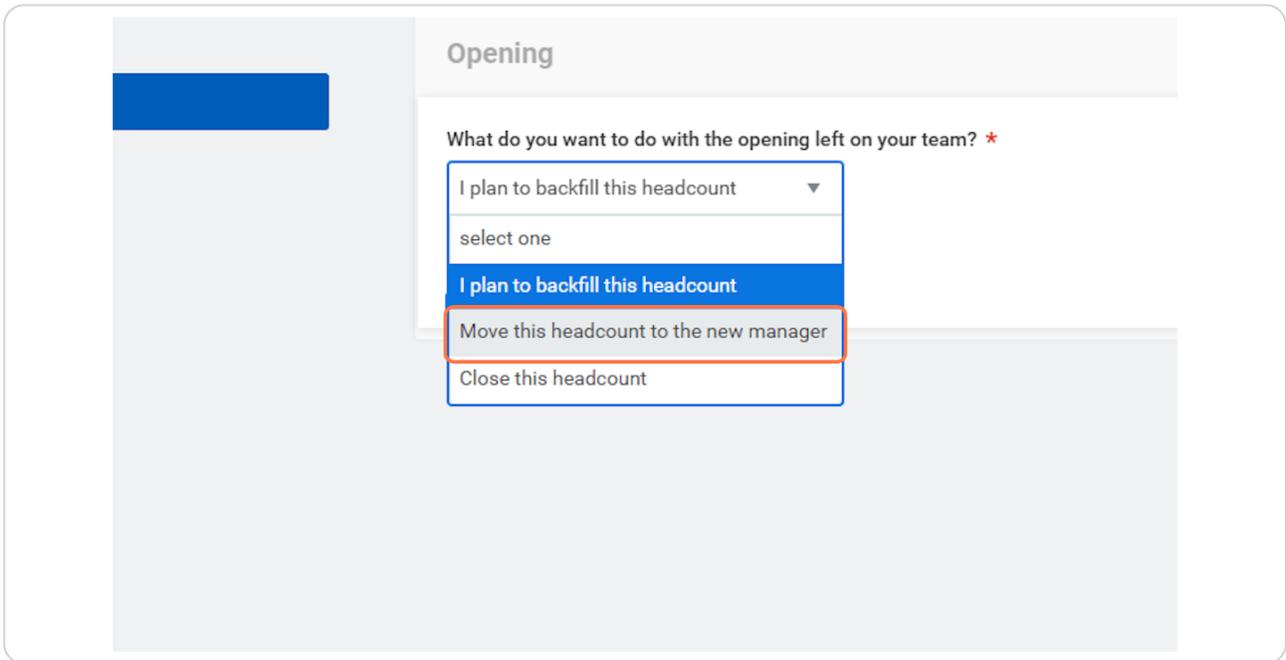
Important: You must change this to "Move headcount to new manager"

Even if you plan to back fill after this transfer you must move the headcount, you will need to contact recruiting to create a new position, requisition, and posting to back fill after you move the employee.

The screenshot shows a web application interface for a 'Change Job' process. The user is 'Trav Swift-Kelce'. The current step is 'Move', which is highlighted in blue. Below this, there is a sub-section titled 'Opening' with a text input field containing 'I plan to backfill this headcount'. Below the input field is a question 'Is this position available for overlap?' with a 'Yes' radio button selected. At the bottom of the form, there are 'Back' and 'Next' buttons.

STEP 14

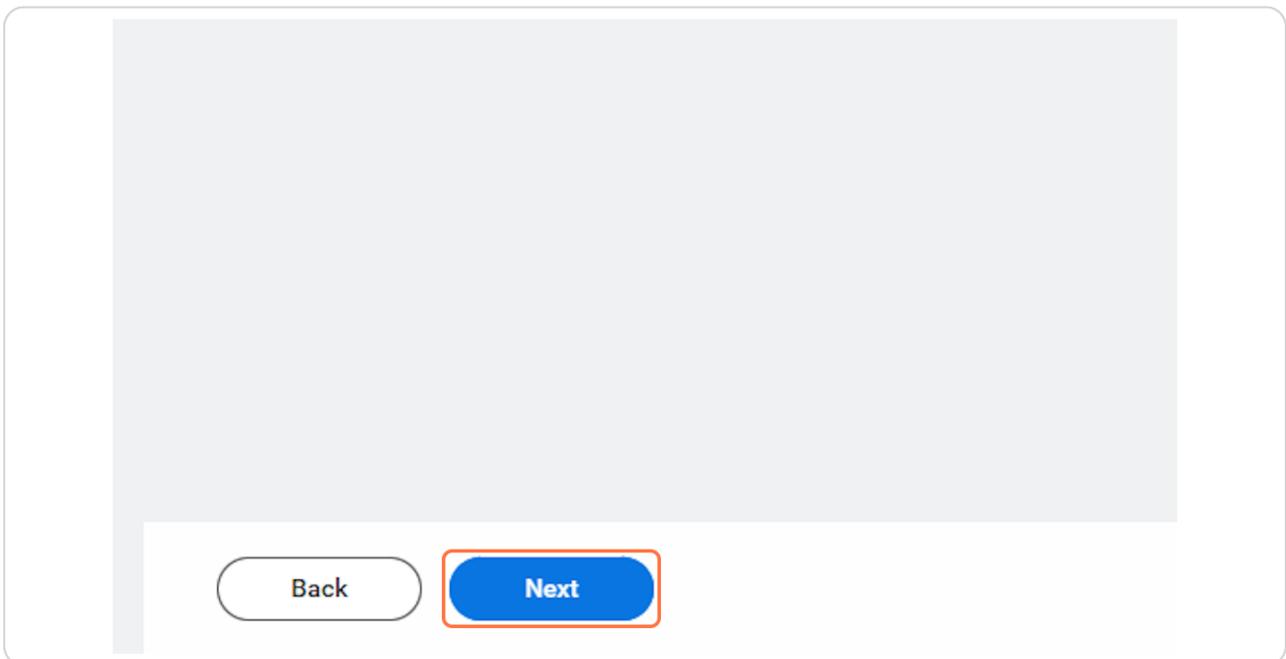
Select "Move this headcount to the new manager"



The screenshot shows a web form titled "Opening". Below the title is a question: "What do you want to do with the opening left on your team? *". A dropdown menu is open, showing four options: "I plan to backfill this headcount", "select one", "I plan to backfill this headcount", "Move this headcount to the new manager", and "Close this headcount". The option "Move this headcount to the new manager" is highlighted with a red border, indicating it is the selected option.

STEP 15

Click on Next

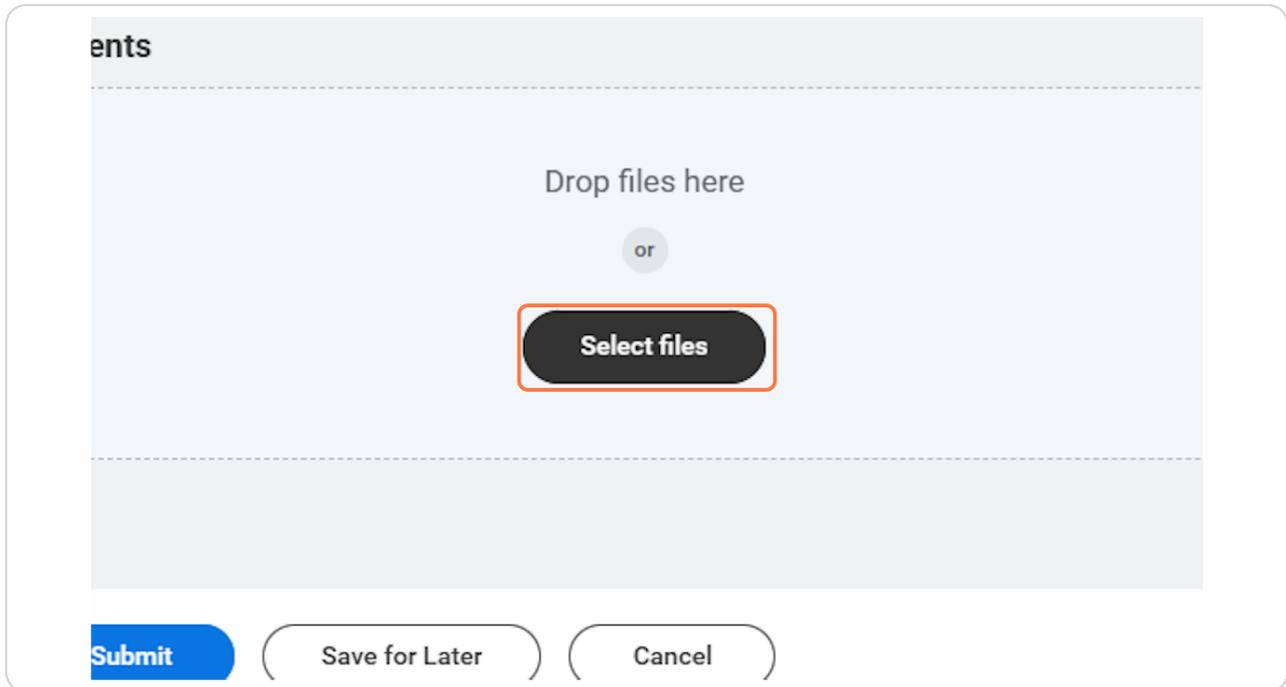


The screenshot shows a web form with two buttons at the bottom: "Back" and "Next". The "Next" button is highlighted with a red border, indicating it is the selected option.

STEP 16

For ALL Job changes you must select a file to upload.

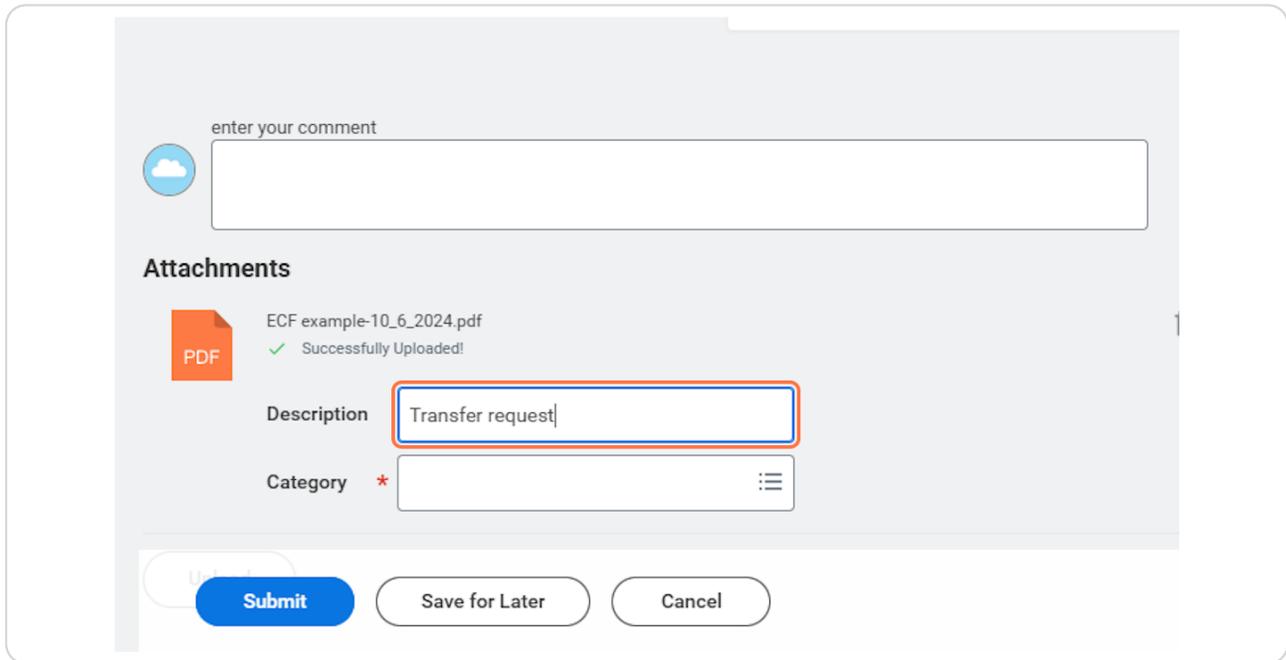
This can be the employee request to transfer or leadership approval or a basic summary for the request, but a document **MUST** be submitted to move forward.



The screenshot shows a file upload interface. At the top left, the word "ents" is partially visible. The main area is a light gray box with a dashed line at the top and bottom. In the center, it says "Drop files here" followed by "or" in a small circle. Below that is a dark gray 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 with a gray border, and a white "Cancel" button with a gray border.

STEP 17

Enter the description of the document.



enter your comment

Attachments

ECF example-10_6_2024.pdf
✓ Successfully Uploaded!

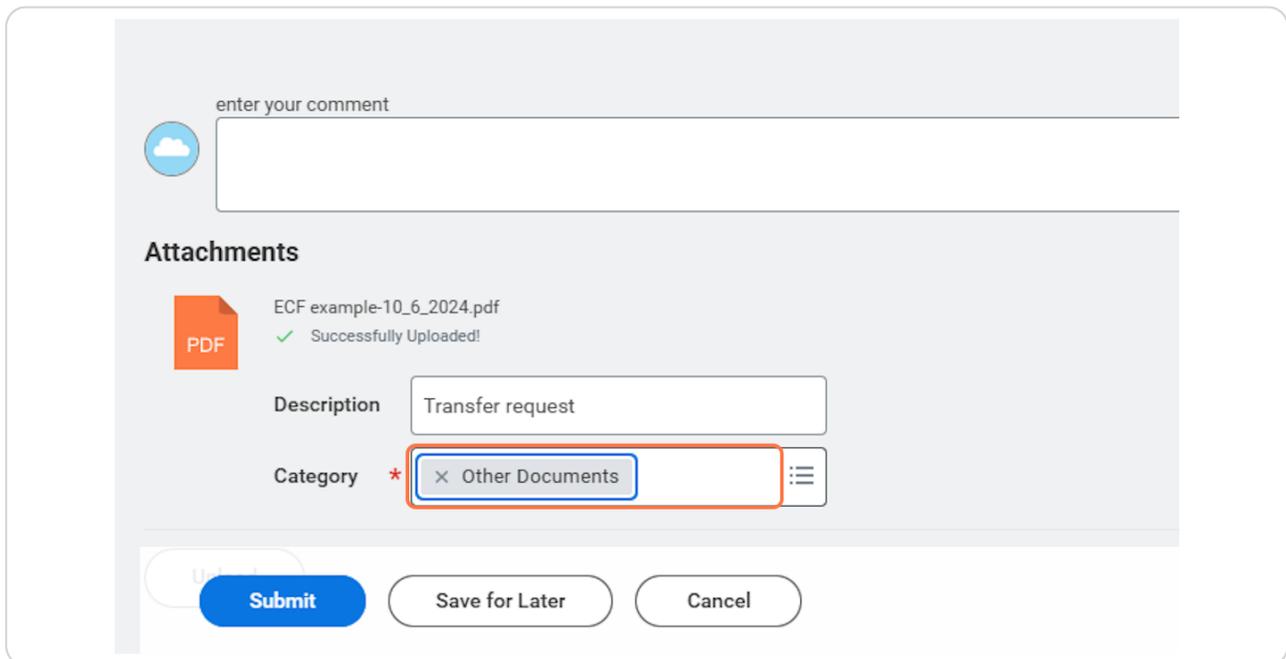
Description

Category *

Submit Save for Later Cancel

STEP 18

Select 'Other Documents' as the category.



enter your comment

Attachments

ECF example-10_6_2024.pdf
✓ Successfully Uploaded!

Description

Category *

Submit Save for Later Cancel

STEP 19

Leave a brief summary/comment as to why this transfer has been requested.
(Optional, but helpful)

Opening

What do you want to do with the opening left on your team? *

Move this headcount to the new manager

Is this position available for overlap?

No

enter your comment

Tracy is moving to Cadillac and has requested to be transferred to the Cadillac location and will now report to Tricia Wing.

Attachments

ECF example-10_6_2024.pdf
✓ Successfully Uploaded!

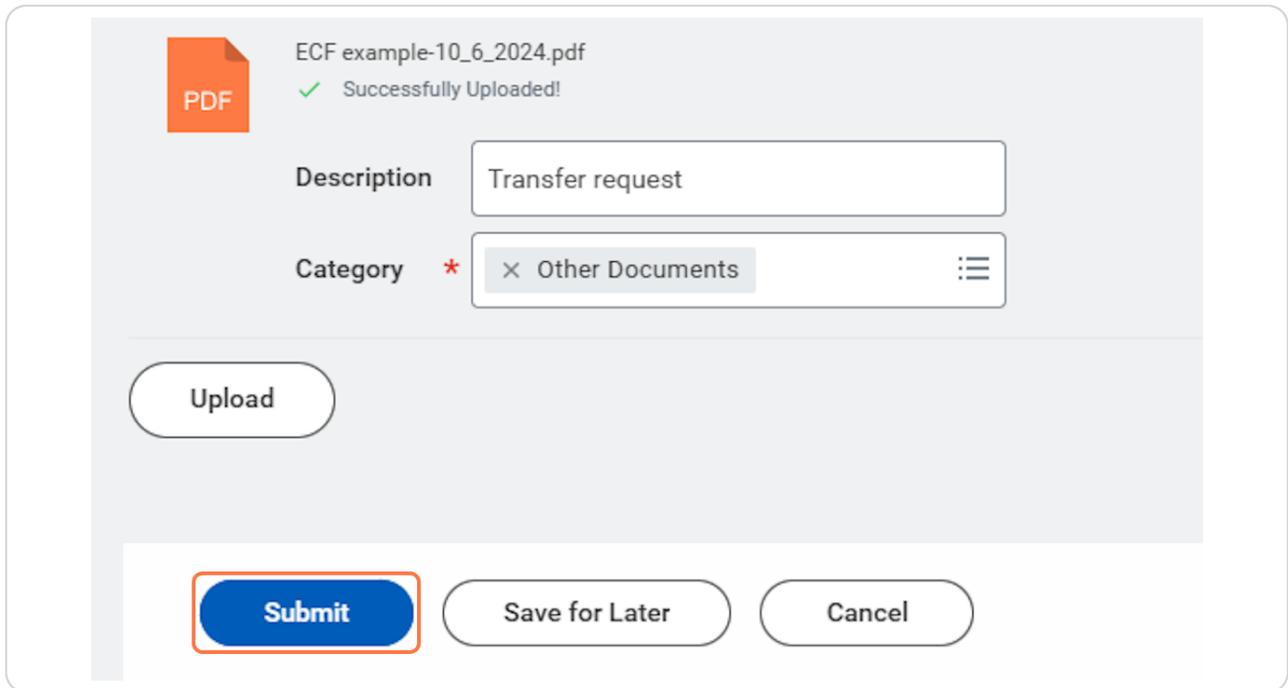
Description: Transfer request

Category: Other Documents

Submit Save for Later Cancel

STEP 20

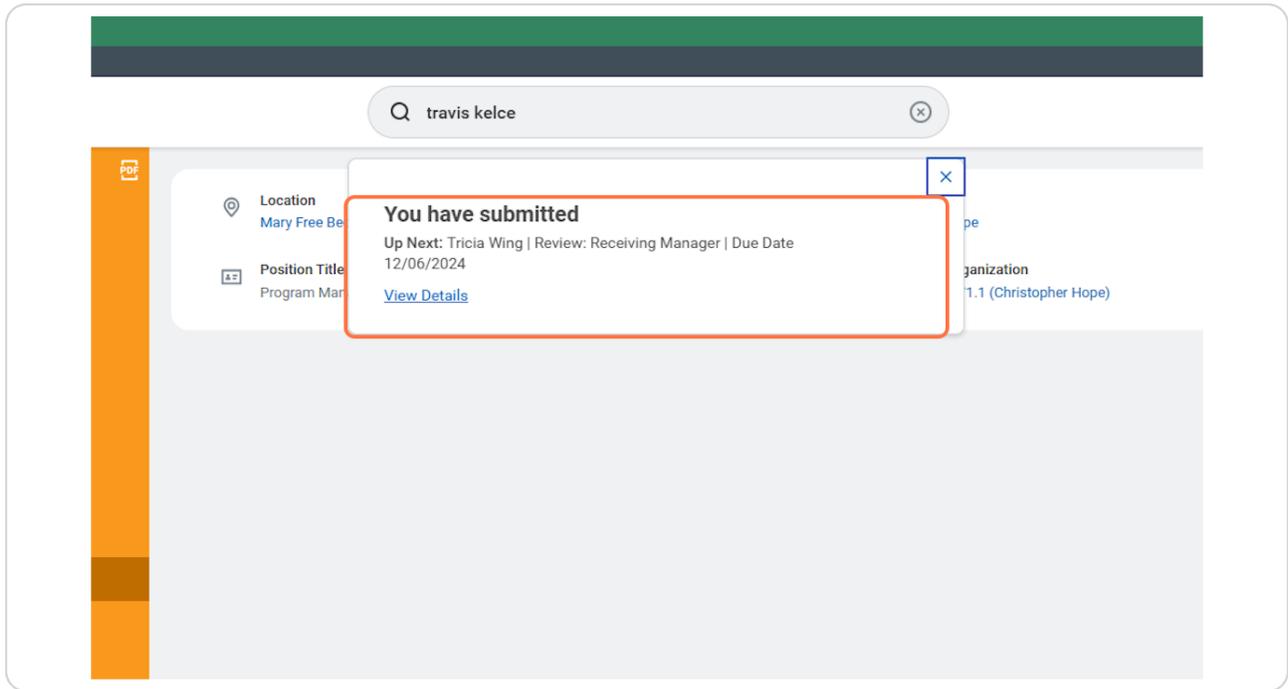
Click on Submit



The screenshot shows a document upload interface. At the top left, there is an orange PDF icon with the text 'PDF' inside. To its right, the filename 'ECF example-10_6_2024.pdf' is displayed, followed by a green checkmark and the text 'Successfully Uploaded!'. Below this, there are two input fields: 'Description' with the value 'Transfer request' and 'Category' with a red asterisk and the value 'Other Documents'. A menu icon is visible to the right of the category field. Below the input fields is a rounded 'Upload' button. At the bottom of the form, there are three buttons: 'Submit' (highlighted with a red border), 'Save for Later', and 'Cancel'.

STEP 21

You have now submitted as the sending manager... the receiving/proposed manager is up next.



Receiving Manager Tasks

8 Steps

STEP 22

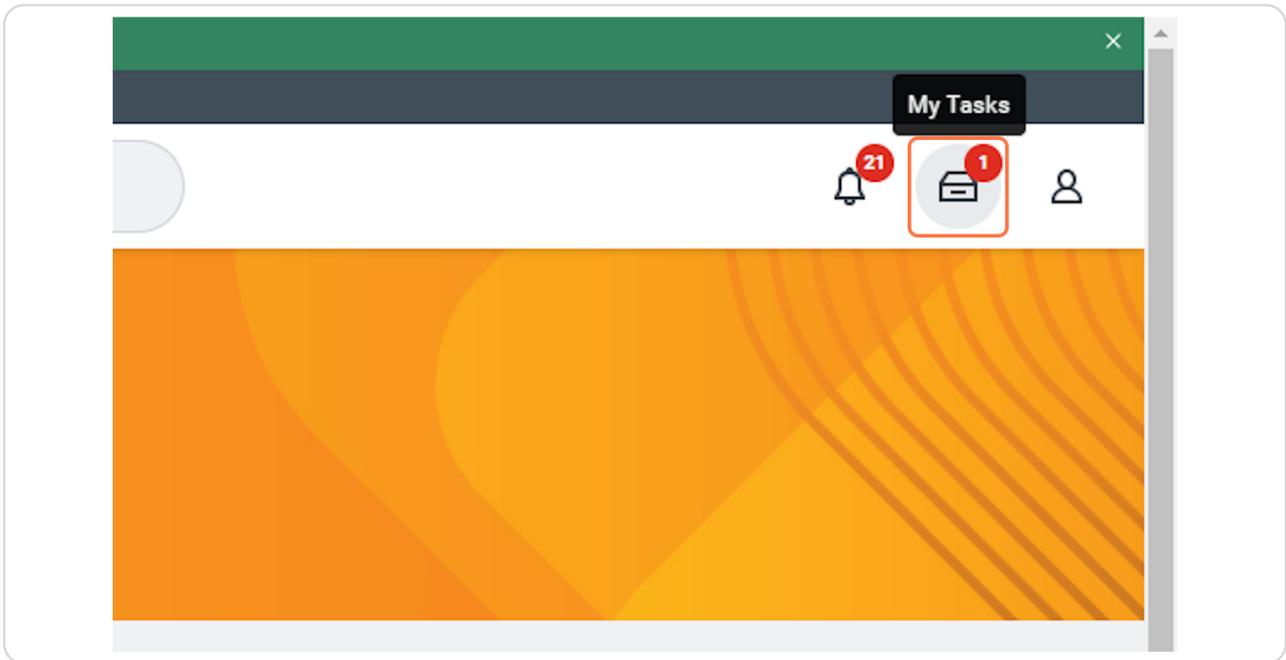
Log in to workday and notice that you have some pending tasks for a transfer request. You can click directly in the task from here.

The screenshot displays a Workday dashboard with an orange header. The main content area is divided into several sections:

- Hello There**: Greeting and date "It's Wednesday, December 4, 2024".
- Awaiting Your Action**: A task card with a red border. It contains:
 - Icon: A briefcase.
 - Title: **Transfer: Trav Swift-Kelce**
 - Text: "My Tasks - 28 second(s) ago"
 - Due Date: **DUE 12/06/2024**
 - Link: [Go to My Tasks \(1\)](#)
- Announcements**: "1 of 1" with a megaphone icon and text: "Welcome to Policy! you have questions".
- Team Highlights**: Lists two team members:
 - [Ashley Gehring](#)
 - [Becca Cataldo](#)
- Important Dates**:
 - DEC **6** **Anniversary** ☆ (Becca Cataldo - 1 year)
 - DEC **25** **Holiday** (Christmas Day)

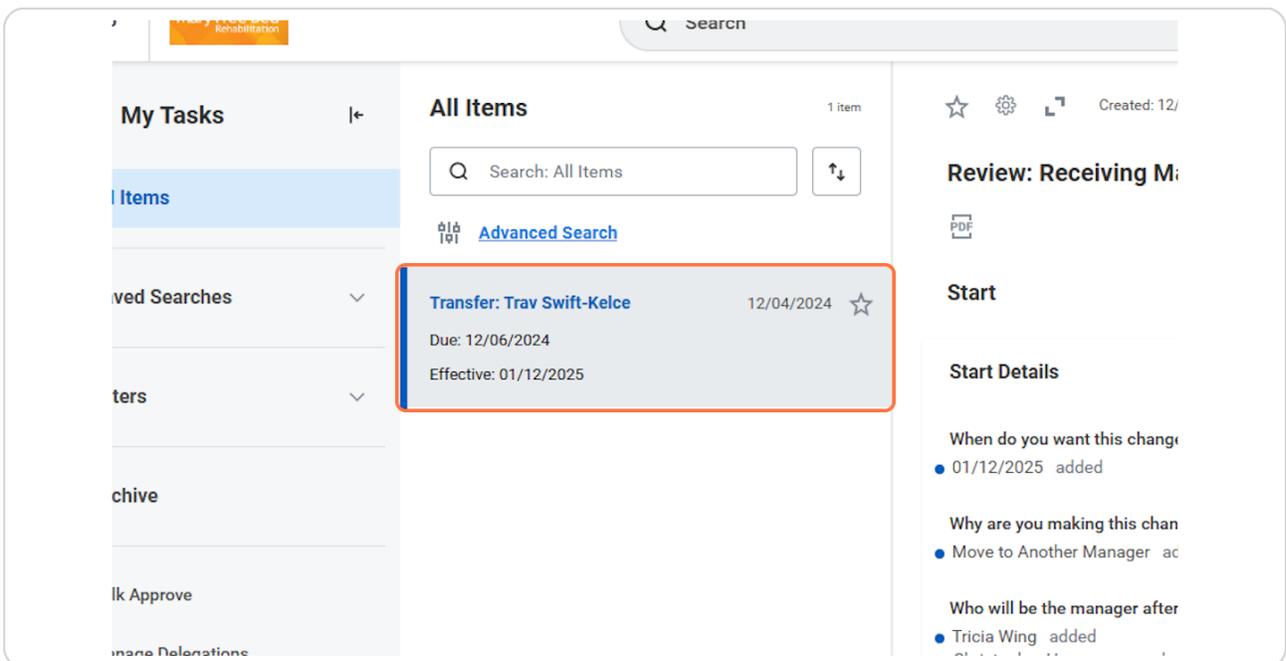
STEP 23

OR, you can click on the inbox icon to navigate to your 'My Tasks' inbox.



STEP 24

Select the Transfer Review Task.



STEP 25

Review the submission, note all blue dots indicate a change to data.

Search

All Items 1 item

Search: All Items

Advanced Search

Transfer: Trav Swift-Kelce 12/04/2024 ☆

Due: 12/06/2024

Effective: 01/12/2025

Start

Start Details

When do you want this change to take effect? *

- 01/12/2025 added

Why are you making this change? *

- Move to Another Manager added

Who will be the manager after this change?

- Tricia Wing added
- ✗ Christopher Hope removed

Which team will this person be on after this change?

- MFB OP Cadillac_7368.1 (Tricia Wing) added
- ✗ OP Otsego_7371.1 (Christopher Hope) removed

Where will this person be located after this change?

- Mary Free Bed at Munson Rehabilitation - Cadillac

Do you want to use the next pay period?

- added

Job

Guide Me

STEP 26

Note any comments left by the sending manager.

enter your comment

12/04/2024 ☆

View Comments (1)

Alexis Brandenburg on behalf of Christopher Hope Just now

Trav is moving to Cadillac and has requested to be transferred to the Cadillac location and will now report to Tricia Wing.

Process History

Christopher Hope Due 12/11/2024

says, "Trav is moving to Cadillac and has requested to be transferred to the Cadillac location and will now report to Tricia Wing." Change Job - Step Completed

STEP 27

You can also click on any attached documents to review information.

**Tricia Wing**Due 12/06/2024

Review: Receiving Manager– Awaiting Action

Attachments


[ECF example-10_6_2024.pdf](#)
Uploaded by Christopher Hope Just now

Description

Category * ⋮



STEP 28

If all looks correct, Click on Approve. If data needs to be updated, click send back with a comment detailing what needs to be updated. This will go back to the sending manager.

Uploaded by [Christopher Hope](#) JUST

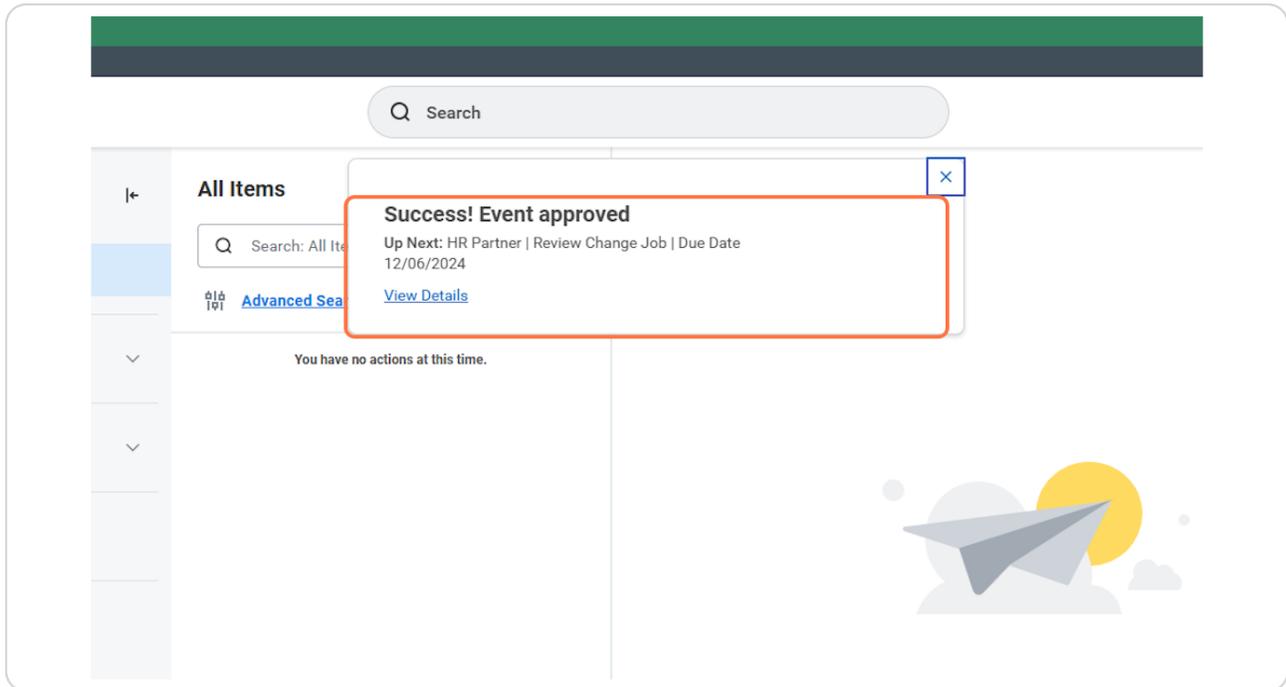
Description

Category *



STEP 29

Now that both managers have approved, the business process has been sent to HR Partner for review and approval. Once approved move to step 30.



Post Approval Receiving Manager Tasks

3 Steps

STEP 30

Navigate to your tasks either through the home page or via your 'My Tasks' Inbox.

Hello There It's Wednesday, December 4, 2024

Awaiting Your Action

-  **Complete Manager Internal Transfer Tasks: Transfer: Trav Swift-Kelce**
My Tasks - 17 second(s) ago
DUE 12/06/2024
-  **Assign Work Schedule for Transfer: Trav Swift-Kelce - Program Manager_1136.S**
My Tasks - 17 second(s) ago
DUE 12/05/2024

[Go to My Tasks \(2\)](#)

Announcements

1 of 1

 Welcome to Policy! you have questions

Important Dates

DEC **6** **Anniversary** ☆
Becca Cataldo - 1 year

DEC **25** **Holiday**
Christmas Day

Team Highlights

STEP 31

Note you will always receiving an internal transfer to do task for ALL job changes under your purview. Some of these to do steps may not be applicable, complete the ones that are and submit when you are finished.

For	MFB OP Cadillac_7368.1 (Tricia Wing)
Overall Process	Transfer: Trav Swift-Kelce
Overall Status	Successfully Completed
Due Date	12/11/2024
Instructions	<ol style="list-style-type: none">1) Submit Network User Form for New Hire: https://itportal.mfbhosp.org/2) Reach out to New Hire with Welcome Message3) Ensure New Hire workspace is ready4) Ensure New Hire has schedule for first week5) 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
	enter your comment
	<input type="text"/>

STEP 32

Assign a work schedule

Note on ShiftWizard Scheduling! if an employees schedule will be managed in ShiftWizard (even if they are salaried), you will need to assign them the "Shift Wizard Schedule". This will automatically send a task to the appropriate manager/timekeeper to update shiftwizard. See instructions for timekeeper in following section.

If no changes need to be made you can simply click submit.

Current Work Schedule: Full Time Salaried Staff 8 Hour Shift

enter your comment

Process History

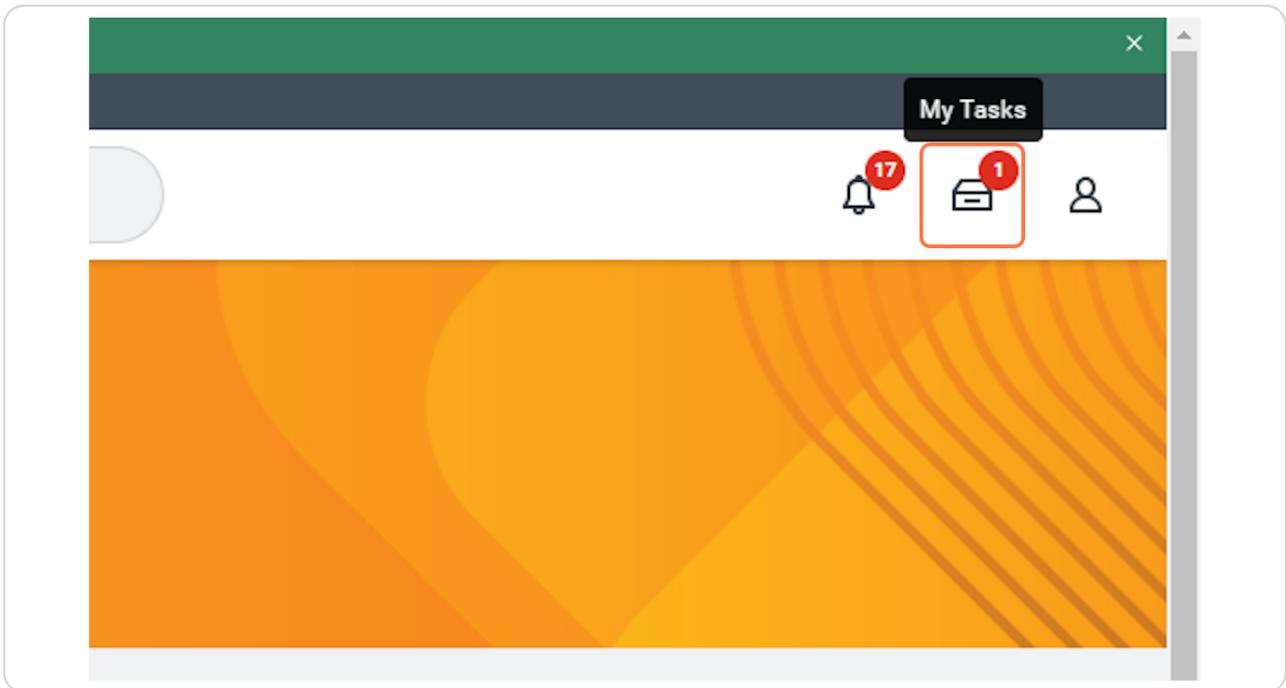
Tricia Wing Due 12/05/2024
Assign Work Schedule- Awaiting Action

Timekeeper/Manager tasks for updating Shift...

10 Steps

STEP 33

Timekeeper should log into their workday account and navigate to 'my tasks.'



STEP 34

You will see To Do to check your notifications on details to update data in ShiftWizard.

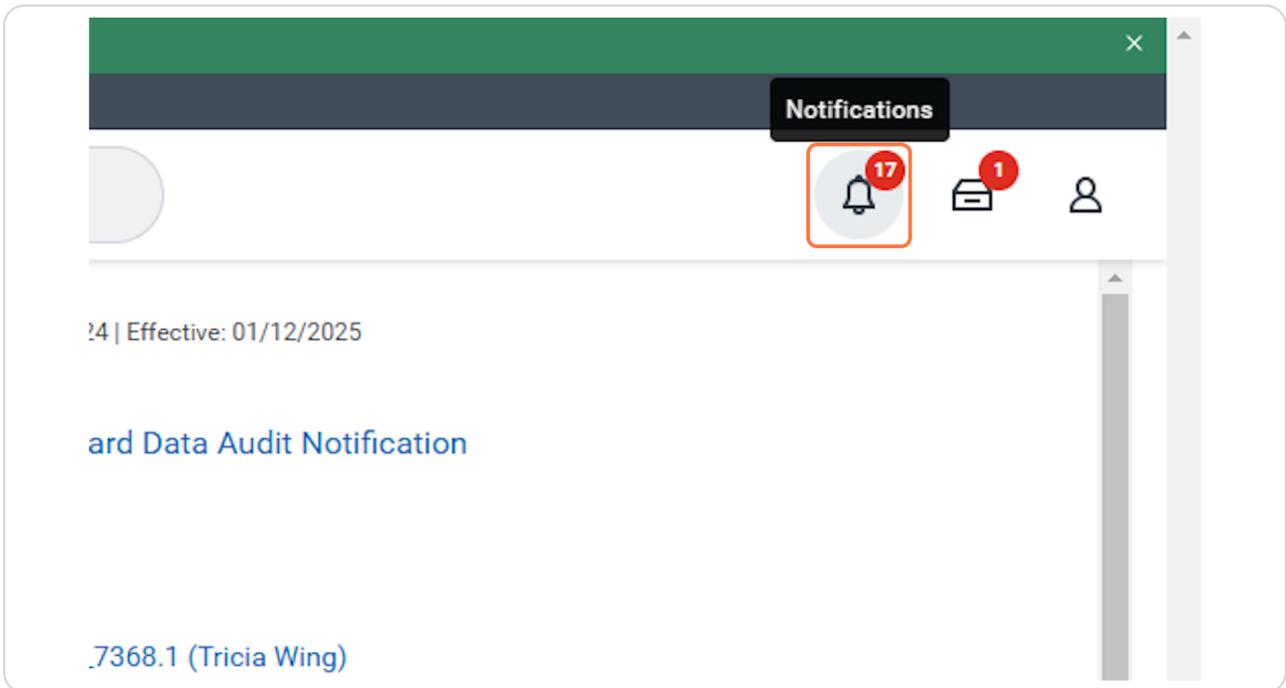
The screenshot displays the 'All Items' section of the ShiftWizard interface. On the left, a sidebar contains navigation options: 'My Tasks', 'Items', 'Advanced Searches', 'Filters', 'Archive', 'Link Approve', and 'Manage Delegations'. The main content area is titled 'All Items' and shows a search bar with the text 'Search: All Items' and a '1 item' indicator. Below the search bar is an 'Advanced Search' link. A single item is listed, highlighted with a red border:

- ShiftWizard Data Audit Notification:** 12/04/2024 ☆
- Assign Work Schedule for Transfer:**
- Trav Swift-Kelce - Program**
- Manager_1136.S on 01/12/2025**
- Effective: 01/12/2025

On the right side of the interface, there are several utility icons (star, gear, square) and a 'Created: 12/' label. Below these is a 'Complete To Do' section with a 'Shi' label and a PDF icon. The 'For' field is set to 'MFB OP Ca'. The 'Overall Process' is 'Transfer: Tr', 'Overall Status' is 'Successfull', and 'Due Date' is '12/11/2024'. The 'Instructions' field contains the text: 'Employee h and comple sure to take as necessa'. At the bottom right, there is a comment input field with the placeholder text 'enter your comment'.

STEP 35

Click on your Notifications Bell.



STEP 36

Review the details outlined in the Shift Wizard notification for assign work schedule. Update ShiftWizard.

Note you may need to connect with the previous time keeper or manager to ensure all information has been updated in ShiftWizard.

Q Search

17 1

Assign Work Schedule for Transfer: Trav Swift-Kelce - Program Manager_1136.S on 01/12/2025

1 minute(s) ago

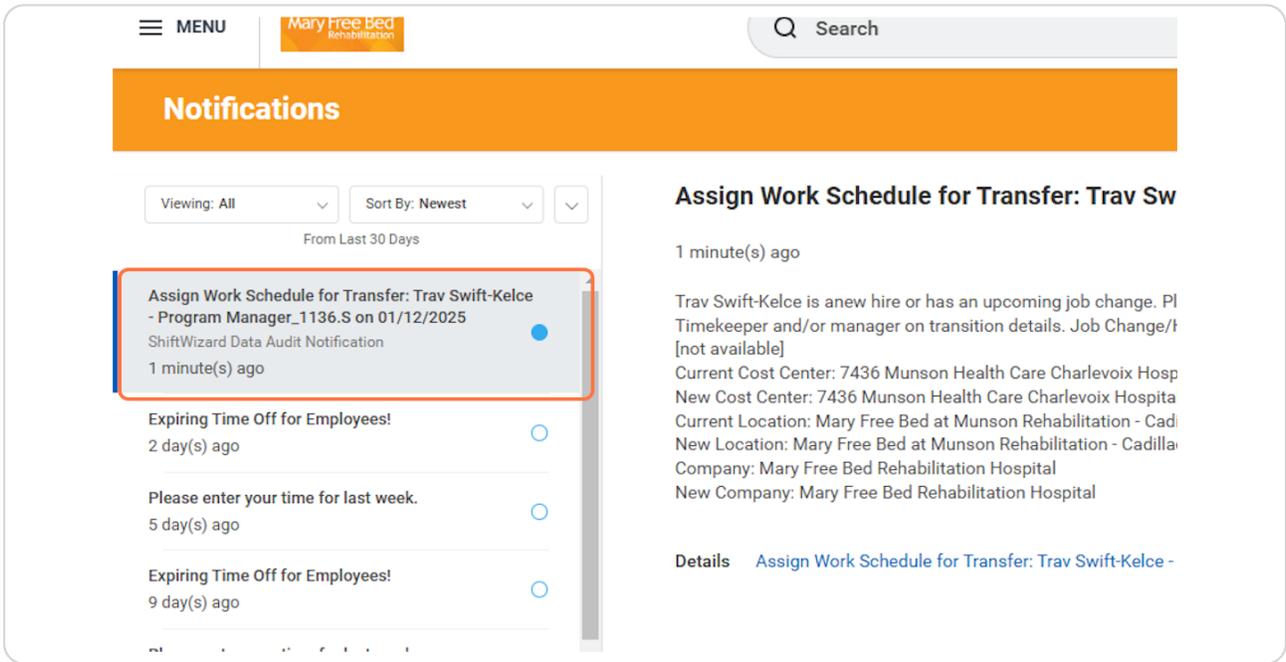
Trav Swift-Kelce is anew hire or has an upcoming job change. Please ensure the employee's data is updated in ShiftWizard. You may need to connect with the previous Timekeeper and/or manager on transition details. Job Change/Hire will be effective 2025 01 12 [not available]

Current Cost Center: 7436 Munson Health Care Charlevoix Hospital
New Cost Center: 7436 Munson Health Care Charlevoix Hospital
Current Location: Mary Free Bed at Munson Rehabilitation - Cadillac
New Location: Mary Free Bed at Munson Rehabilitation - Cadillac Current Job Profile: Program Manager_1136.S New Job Profile: Program Manager_1136.S Current Company: Mary Free Bed Rehabilitation Hospital
New Company: Mary Free Bed Rehabilitation Hospital

Details [Assign Work Schedule for Transfer: Trav Swift-Kelce - Program Manager_1136.S on 01/12/2025](#)

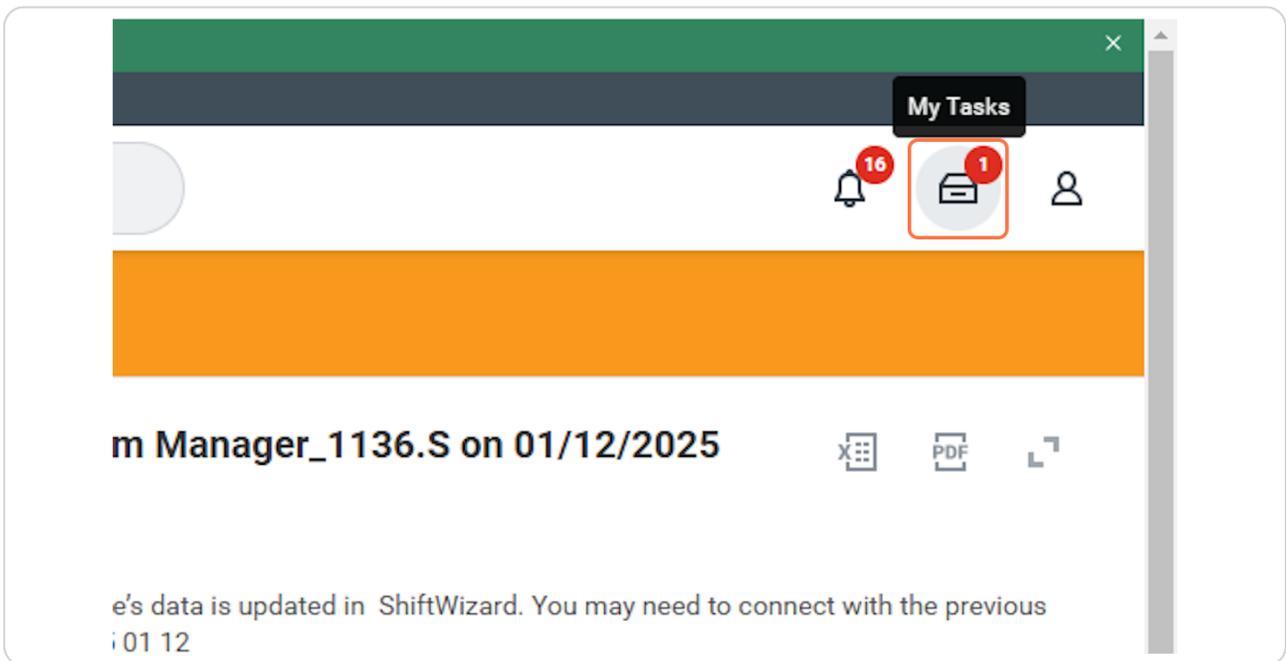
STEP 37

Once Completed, click the radio button to 'complete' your notification.



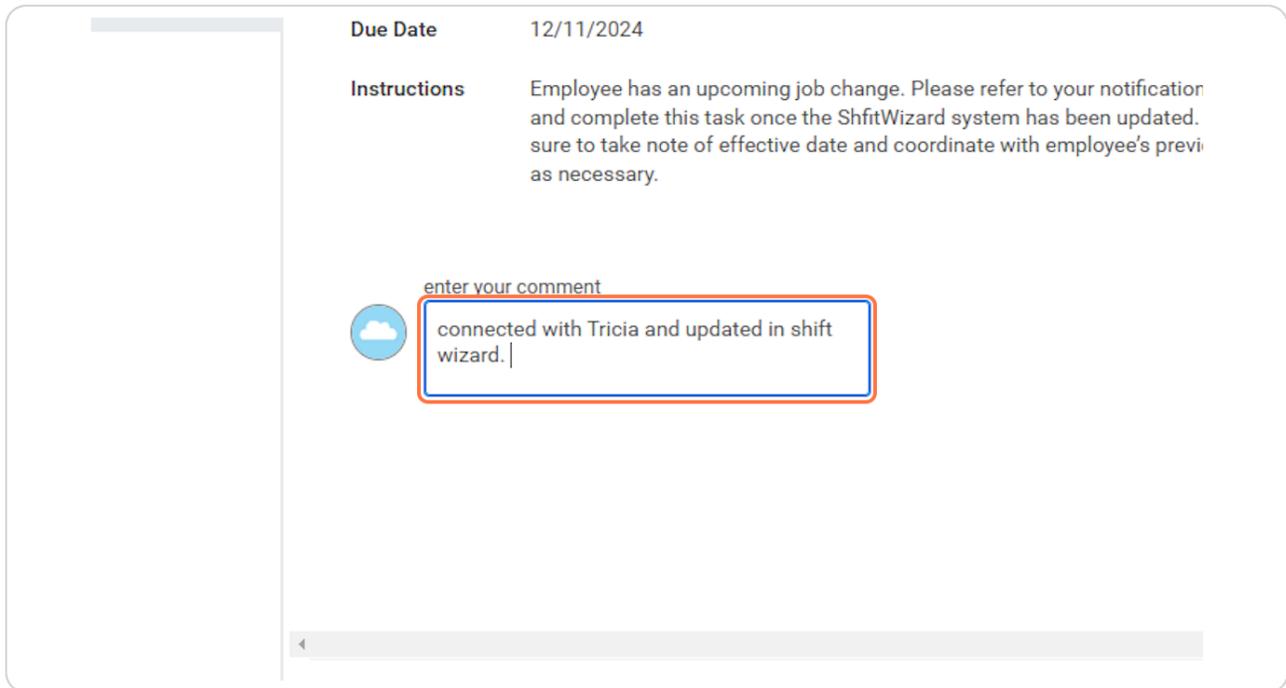
STEP 38

Navigate back to your tasks.



STEP 39

Select the ShiftWizard task, enter a comment if necessary, and submit.



The screenshot displays a task interface with the following elements:

- Due Date:** 12/11/2024
- Instructions:** Employee has an upcoming job change. Please refer to your notification and complete this task once the ShiftWizard system has been updated. Be sure to take note of effective date and coordinate with employee's previous as necessary.
- Comment Box:** A text input field with a placeholder "enter your comment". A blue circular icon with a cloud symbol is positioned to the left of the input. The text "connected with Tricia and updated in shift wizard." is entered into the box.

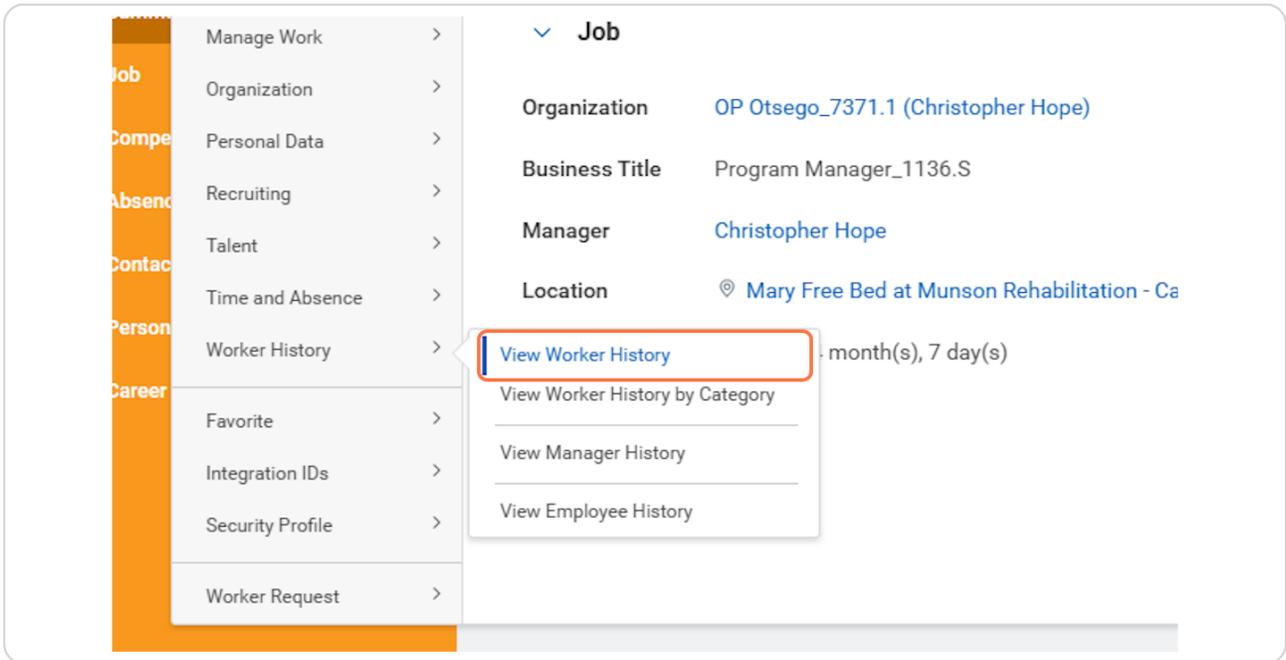
STEP 40

This Process is now Complete

Again, the receiving manager will not be able to review worker history and pending changes until the effective date has past. The current manager can navigate to the worker profile, select actions>Hover over Worker History>click view worker history by category, and select 'staffing' tab. This will show you all Data changes completed and in progress.

STEP 41

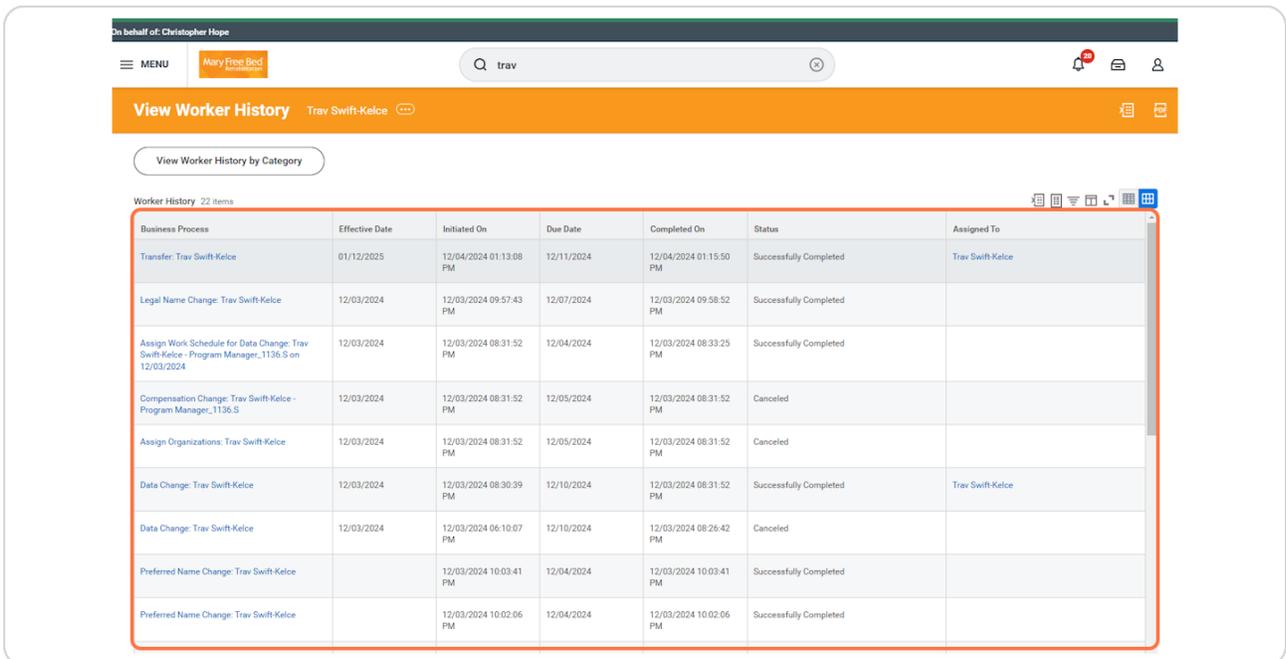
Click on View Worker History



The screenshot shows a navigation menu on the left with an orange sidebar. The 'Job' section is expanded, showing a list of options. 'View Worker History' is highlighted with a red box. To the right, the 'Job' details are visible, including Organization (OP Otsego_7371.1 (Christopher Hope)), Business Title (Program Manager_1136.S), Manager (Christopher Hope), and Location (Mary Free Bed at Munson Rehabilitation - Ca). Below the location, there is a partial view of a date range: 'month(s), 7 day(s)'. A dropdown menu is open under 'View Worker History', listing options: 'View Worker History by Category', 'View Manager History', and 'View Employee History'.

STEP 42

Click on Worker History...



The screenshot shows the 'View Worker History' page for Trav Swift-Kelce. The page header includes 'On behalf of: Christopher Hope', 'MENU', 'Mary Free Bed Rehabilitation', and a search bar with 'trav'. The page title is 'View Worker History Trav Swift-Kelce'. Below the title, there is a button 'View Worker History by Category'. The main content is a table titled 'Worker History 22 items' with the following columns: Business Process, Effective Date, Initiated On, Due Date, Completed On, Status, and Assigned To. The table contains 8 rows of data.

Business Process	Effective Date	Initiated On	Due Date	Completed On	Status	Assigned To
Transfer: Trav Swift-Kelce	01/12/2025	12/04/2024 01:13:08 PM	12/11/2024	12/04/2024 01:15:50 PM	Successfully Completed	Trav Swift-Kelce
Legal Name Change: Trav Swift-Kelce	12/03/2024	12/03/2024 09:57:43 PM	12/07/2024	12/03/2024 09:58:52 PM	Successfully Completed	
Assign Work Schedule for Data Change: Trav Swift-Kelce - Program Manager_1136.S on 12/03/2024	12/03/2024	12/03/2024 08:31:52 PM	12/04/2024	12/03/2024 08:33:25 PM	Successfully Completed	
Compensation Change: Trav Swift-Kelce - Program Manager_1136.S	12/03/2024	12/03/2024 08:31:52 PM	12/05/2024	12/03/2024 08:31:52 PM	Canceled	
Assign Organizations: Trav Swift-Kelce	12/03/2024	12/03/2024 08:31:52 PM	12/05/2024	12/03/2024 08:31:52 PM	Canceled	
Data Change: Trav Swift-Kelce	12/03/2024	12/03/2024 08:30:39 PM	12/10/2024	12/03/2024 08:31:52 PM	Successfully Completed	Trav Swift-Kelce
Data Change: Trav Swift-Kelce	12/03/2024	12/03/2024 06:10:07 PM	12/10/2024	12/03/2024 08:26:42 PM	Canceled	
Preferred Name Change: Trav Swift-Kelce		12/03/2024 10:03:41 PM	12/04/2024	12/03/2024 10:03:41 PM	Successfully Completed	
Preferred Name Change: Trav Swift-Kelce		12/03/2024 10:02:06 PM	12/04/2024	12/03/2024 10:02:06 PM	Successfully Completed	