

### When to use this form

This form should be used when making changes to an employee's current job details. The form is completed online and then routed electronically to the appropriate approvers. For transfers from another department within the University please contact faculty/unit Recruiters for information related to posting and selection. Changes include the following type of transactions:

#### Job Change Requests

- Accounting Change
- Business Unit Change
- Change in Work Schedule
- Department Change (non-Reorg) \*Please note\* Ensure you update the Earnings Distribution when completing this transaction
- End Group Leader Premium
- Extension
- Extension After End Date
- Group Leader Premium
- Growth Increment
- Reports to Update
- Temporary Change in Hours
- Title Change

\* Not all transactions are eligible for all job/appointment types. The transaction types available on the job change form will be determined by the type of job or appointment selected.

Ensure adequate time for processing the Job Change form by submitting the form to Human Resources by the deadlines outlined in the [HR Deadline Calendar](#). Forms received by HR Operations after the deadline will be processed in the following pay period.

### How to use this form





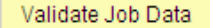
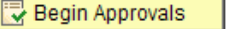
**Navigate to Manager Self Service > Job and Personal Information > Job Change Request.**

The Job Change Request page will allow you to **Search for Transactions** or **Initiate a New Transaction**. This page will identify the employee for which you are requesting a job change and the job record to be transacted.

#### To search for an existing request:

When searching for an existing job change request use one or more fields to define your search and click the Search button. Refer to the table on the following page for more details.

## To create a new request:

- Step 1: Click on 'Initiate a New Transaction' and enter an Emplid (Employee ID). You can click  on the Emplid field to use other criteria, such as First and Last Name, to select the correct employee. Once you have selected an Emplid, click  on the Empl Rcd Nbr (Employee Record Number) field to view all the jobs held by the employee. If the employee holds multiple jobs at the University, be sure to select the correct Empl Rcd Nbr. Once you have selected the Emplid and Empl Rcd Nbr, click .
- Step 2: Select the Effective Date and Transaction Type and enter the job change details on the Job Change page and click . The system will assign a transaction number to your request when you save the form.
- Step 3: Click  to verify that the request you have created can be processed successfully. Look for the 'Job Edits OK' message.
- Step 4: If the job edits are successful, click . This will send the transaction and applicable notifications to the first approver in the approval pathway. The transaction will eventually end up in HR Operations for processing.



## Field Explanations

The following is a list of fields and corresponding definitions.

### Search Page – Search for a Transaction

<b>Target User ID</b>	The Employee ID of the person who created the online request in the system. A search on this field will yield all transactions created by the defined individual.
<b>Transaction Number</b>	Every request is automatically assigned a transaction number. A search can be performed if you know that number.
<b>Workflow Status</b>	A search can be performed on transactions in a given status.
<b>Empl ID</b>	Empl ID is a unique identifier given to all UofC employees. The Empl ID can be obtained from the employee or searched in PeopleSoft HCM:  Navigation: Workforce Administration> Personal information> Search For People
<b>Employee First Name</b>	Enter the Employee's first name to find existing transactions for the employee.
<b>Employee Last Name</b>	Enter the Employee's last name to find existing transactions for the employee.
<b>Empl Rcd Nbr</b>	This number identifies the job that is being changed for the employee (e.g. 0-10). For employees with one job this normally defaults to 0, but for employees with multiple jobs it is important to obtain which record number the job belongs to.

### Search Page – Initiate a New Transaction

<b>Transaction Number</b>	This field is blank until the new job change request has been saved.
<b>Empl ID</b>	Empl ID or Employee ID is a unique identifier given to all U of C employees. The Empl ID can be obtained from the employee. Alternatively, you can click  on this field to search for the employee by First or Last Name.
<b>Empl Rcd Nbr</b>	Empl Rcd Nbr or Employee Record Number is used to identify the specific job held by the employee at the University. It is used extensively for employees who hold multiple jobs on campus. Click  to view and select the job you wish to change.

### Transaction Details

Once inside the form, the system will pre-populate job data from the job record indicated on the Search page. Before any changes can be initiated, the **effective date of the transaction must be selected first**, followed by the transaction type (Trans Type).

<b>Trans Type</b>	<p><i>Select from the drop-down list.</i> The Transaction Type identifies the type of change you are making.</p> <p>The transaction types available in the drop-down list will be determined by the type of job or appointment selected. The transaction selected will also activate specific fields in the 'New' section of the form that the initiator must complete. To view a summary of each transaction including definitions, guidelines, required and optional fields as well as helpful hints see <b><i>Online Form Entry Checklist for Job Change Requests</i></b>. It is recommended that you print out this checklist for easy reference.</p>
<b>Position #</b>	A number assigned on the employee's job record. Generally only jobs in the UCALG business unit are positioned. Position # is required when making changes to an employee's Reports To information.
<b>Effective Date</b>	<p>The system will automatically input the current date as the Effective Date. When the transaction type has been selected, you have the option of changing the date.</p> <p>The Effective Date should reflect the first day on which the change will take place.</p>
<b>Expected End Date</b>	For temporary positions – indicates the last day of employment. Can also be used to indicate the expected end date of an action like temporary change in hours.
<b>Auto End Job</b>	If this indicator is checked the job will be terminated in PeopleSoft HR/ Payroll, stopping the employee's pay, the day after the Expected End Date.

### Job Information

Fields will become active when the transaction type is selected. Which fields become active will be dependent upon the transaction type selected. Input changed data in the active fields.

<b>Business Title</b>	Title of the position being filled – typically found on the job posting or position description.
<b>Business Unit</b>	Identifies if the employee will be paid out of a project or operating budget. UCALT is for project based funding. UCALG is for non-project based funding.
<b>Dept ID</b>	A 5-digit number assigned to the department or faculty where the position/ job resides. If a Department cannot be located, please contact Human Resources at (403) 220 – 5932.
<b>Job Code</b>	An alpha-numeric code that represents the Job Family and Job Phase/Zone as defined in the AUPE Collective Agreement and for Management & Professional Staff. Job codes are also applied appropriately to all other employee groups.
<b>Pay Group</b>	A code that defines a set of employees for payroll processing.
<b>Full/Part Time</b>	Employee's are considered part time when they work less than the standard hours specified for the their job category (e.g. .5 FTE)
<b>Reg/Temp and Empl Class</b>	The Employee Class is used to classify employees within the Regular and Temporary groupings.
<b>Std Hrs/Wk</b>	Typically displays the default weekly hours for a given Job Code. If the transaction type involves a change in hours, the field will become active.
<b>Ben Program</b>	The Benefit Program code defines the benefits and deductions associated with an employee group.
<b>Union/ Group</b>	<b>AUP</b> = most AUPE positions
	<b>AUX</b> = AUPE positions that are union-exempt
	<b>MaPS</b> = MaPS positions
	<b>N/A</b> = Casual positions
	<b>TUX</b> = Senior Administration positions
<b>Reports To</b>	This field contains the position number of the manager/ supervisor this person reports to.
<b>Comp Rate Code</b>	<b>MONTH</b> = AUPE
	<b>NAANNL</b> = MaPs and SLT appointments
	<b>NAHRLY</b> = Recurring Part Time
<b>Annual, Monthly, Hourly Rate</b>	The monthly salary for Support Staff. The annual salary for MaPS and Senior Administration. The Hourly rate for hourly staff – Recurring Part Time.

<b>Earnings Distribution</b>	The Earnings distribution indicates the appropriate account information where employee earnings will be changed. Ensure to provide percentages as indicated. Key in the individual ChartFields and the accounting data and comb code will populate into the job change form.
<b>Immigration Information</b>	Up-to-date Immigration data is required for all foreign workers.
<b>Work Schedule</b>	<b>Hours/day</b> = The number of hours the new employee will be working per day.
	<b>Start Time</b> = The start time of the new employee – required for shift schedules where shift premiums/ differential applicable. Define AM or PM by selecting the correct indicator.
	<b>Comments/ Schd ID</b> = Indicate non-standard schedule details including rotation schedules, varying start times etc.
<b>Comments</b>	Open text field to allow requestor to add more details regarding the change.

### Next Steps

Once you have completed all the required and mandatory fields on the Job Change Request form, you will need to save the transaction and prepare and submit it for approvals. Those steps are outlined next.

- **SAVE** the page when the changes have all been input.
- **Validate Job Data** will be activated. Click Validate Job Data.
- The request is ready for approval stages if the Job Edits process generates a 'Job Edits are OK' message.
- **Begin Approvals** button is activated. Click this to begin the approval process.

You can exit the transaction at any time after you've saved, validated or Began Approvals. You will need to search for saved transactions by transaction number or the employee ID. When returning to search for a transaction you will be able to filter your search by the status of the transaction.

### Transaction Status

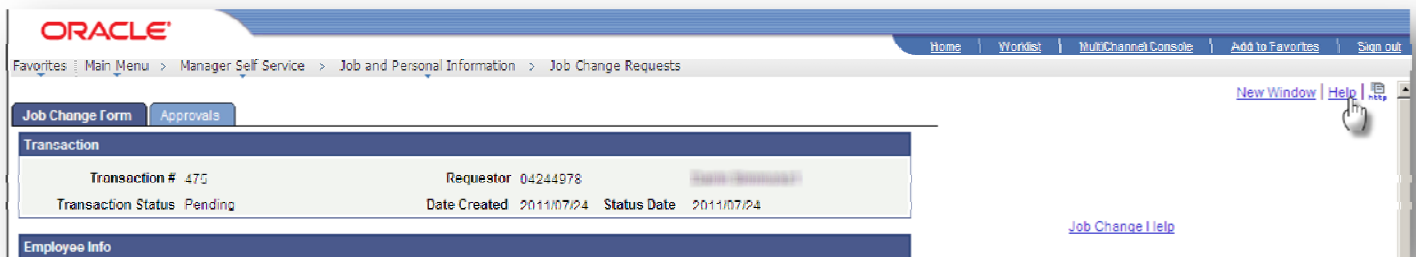
When initiating or reviewing a transaction, the transaction status will change as the transaction moves through the steps outlined above. When searching for a transaction it is helpful to understand transaction status to determine where the transaction is in process. A summary of Transaction Status is provided next:

<b>Saved</b>	The transaction has been initiated and saved. This is the first step in initiating a new transaction. Once in Saved status Job Data can be validated by clicking the Validate Job Data button.
<b>Waiting for Approvals</b>	Job Data has been validated and 'Job Edits are OK'. Once in this status the transaction is ready for Begin Approvals.

<b>Pending</b>	The transaction has been sent for approvals. The transaction will stay in Pending until all approvers have approved the transaction. When searching for a transaction or when approving a transaction the search results will indicate who the transaction is pending on.
<b>Approved</b>	The transaction has been approved by all approvers in the approval pathway.
<b>Completed</b>	The transaction has been processed by HR Operations and the employee's job record has been updated.
<b>Retracted</b>	A transaction has been retracted by the initiator. A transaction can only be retracted while it is in Pending status. Only the initiator can retract a transaction and they must comment the reason for the action prior to retracting.
<b>Canceled</b>	The transaction has been canceled by the initiator. A transaction cannot be canceled once it is in approved status. Only the initiator can cancel a transaction and once in Pending status they must comment the reason for the action prior to canceling.

### Help

At anytime during the initiation of a Job Change transaction you can click the help link in PeopleSoft HCM to view UPK demonstrations of the initiation of various job change transactions.





## Job Change Request Help

**HUMAN RESOURCES**  
Administration 202  
Ph: (403) 220-5932  
Email: HR@ucalgary.ca



If you require further assistance with initiating a job change transaction, call the HR Help Desk at 403-220-5932 or email [HR@ucalgary.ca](mailto:HR@ucalgary.ca). If you are getting an error message remember to note the message and message number to give to the Client Service Representative.