

JOB OVERLAP - INTERNAL MOVEMENT INSTRUCTIONS



City of Dallas

Overview/Purpose:

To remain adaptable in recruitment/retention efforts, a process has been developed to provide departments the opportunity to pursue a job overlap strategy for positions where the incumbent is slated to leave (transfer, promotion, exceptional promotion, demotion), but the action has not yet completed in Workday. Enabling a **job overlap** will allow the department to post the position and begin the recruitment process when the current incumbent has not yet vacated their position. It will also allow a brief overlap of the outgoing employee and incoming employee to reside in the same PM should that situation occur.

[This process is not to be used for resignations, terminations or retirements please use the current Workday process for these events.](#)

Job Overlap Request Steps: Department Instructions:

- 1) Department receives notification of the incumbent's "Notification to Vacate PM".
- 2) Open a ServiceNow Ticket to request job overlap directed to HR Compensation providing the following information:
 - a. Position Number
 - b. Effective Date of Job Overlap
 - c. Attachment of the outgoing employee's completed Notification to Vacate PM form.
- 3) Once received by HR Compensation, the assigned analyst will Edit Position Restrictions on the impacted PM to enable job overlap. A notification will be sent back to the department notifying them that the position is now available to initiate the requisition to begin the recruitment process.
- 4) Next, the department should work to open the corresponding job requisition and post the position.
- 5) Once the recruiting process has completed (and the new incumbent of the PM is fully in the role and old incumbent is completely out of the PM), the department needs to notify HR Compensation, by submitting a ServiceNow Ticket, to cancel the job overlap.
Please include the information listed below in the ServiceNow Ticket:
 - a. Position Number
 - b. Brief comment that the job overlap is to be canceled.

Job Overlap Request Steps: HR Compensation Instructions:

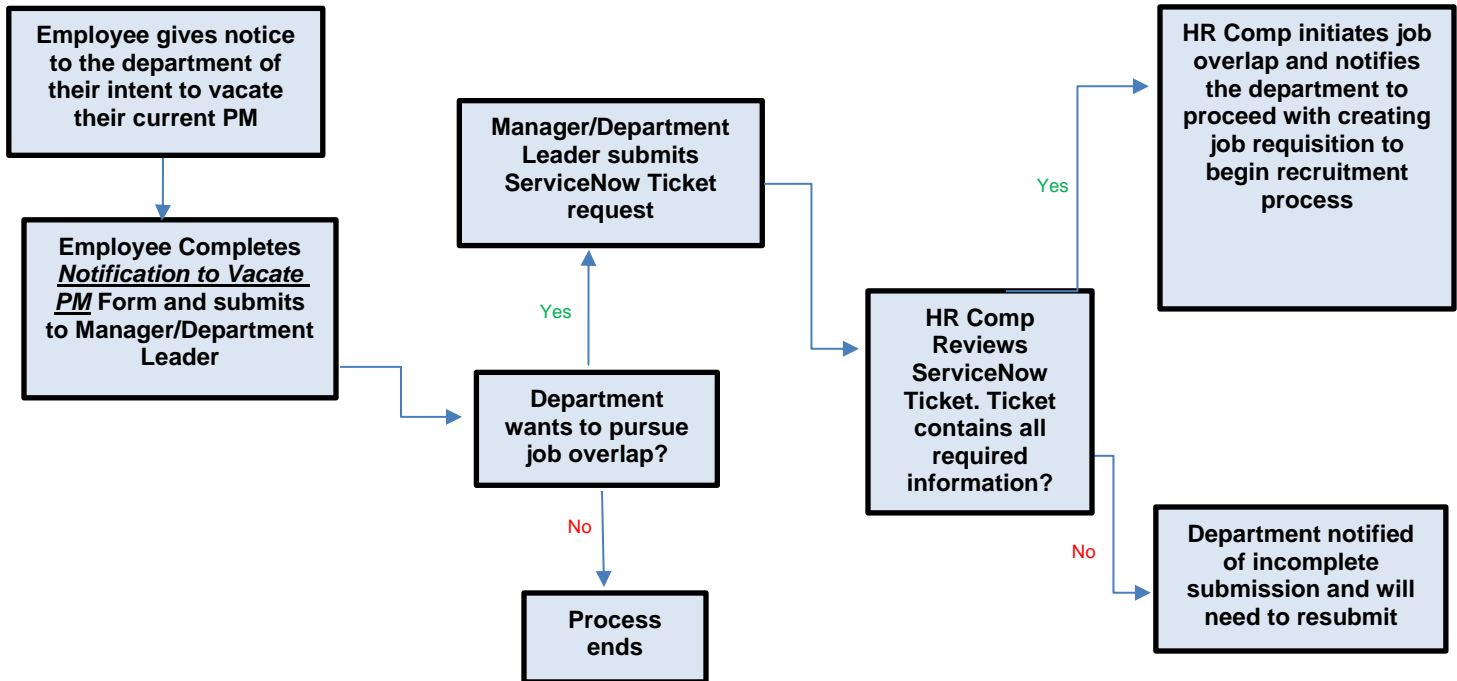
- 1) **CRITICAL:** Ensure that there are no pending transactions on the PM intended to be overlapped. Any incoming transactions (hires, job requisitions, move workers, etc.) will prevent you from being able to properly Edit Position Restrictions and enable the job overlap.
- 2) Once PM is verified to be clear of any incoming transactions. Pull up the PM, go to "Edit Position Restrictions", scroll down to the bottom of the page, and select the "Available for Overlap" selection. Make sure the checkmark is in the box and then click "Done".
- 3) Log the change in the "Historical Job Overlap" document in the SharePoint drive.
- 4) Notify the department that the change has been completed and let them know that they need to notify HR Compensation when they no longer need the job overlap.
- 5) To turn off job overlap: Follow steps 1 and 2 and ensure that all incoming transactions have fully processed before editing the position restrictions (otherwise Workday won't allow for an edit).

Job Overlap – Internal Movement: Approval Flowchart



City of Dallas

Submit Request for Job Overlap Flowchart:



Request to Cancel Job Overlap Flowchart:

