The schedule won't load after inactivating an HLSO.

Cause:

When turning off an HLSO, existing scheduling organizations will continue to traverse up the organization chain to find an enabled HLSO with valid configuration to use for rendering the schedule.

Solution: These four configurations must be the same as the configuration used when the schedule was created.

- Start day of week.
- Location and time zone.
- Labor demand period length.
- Subgroup organization (SGO) settings, including SGO usage, SGO list, and SGO time zone.

Re-enable the HLSO, clear the schedule, then disable the HLSO and recreate the schedule under the new HLSO.

Absence

Setup Considerations: Absence Management

You can use this topic to help make decisions when planning your configuration and use of Workday Absence Management. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Workday Absence Management enables you to track your workforce’s time away from work. Workers can request short-term time off or long-term leave of absence.

Business Benefits

- Works seamlessly with the main Workday product areas, including Workday Payroll, Workday Time Tracking, and Workday Assistant.
- Provides flexibility by enabling you to create multiple time off and leave types.
- Makes it easy for workers to request time off and leave of absence when needed.
- Helps your organization to comply with regulatory time off and leave requirements.
- Enables workers to view their time off balances and leave requests in a single absence calendar or team absence calendar.
- Helps you to respond to General Data Protection Rules by purging absence data for terminated workers.
- Integrates with third-party calendar applications to send approved time off events from Workday to your corporate calendars.
- Supports benchmarking, enabling you to compare your worker absence rates and policies with peers in your industry.

Use Cases

Workers can:

- Enter time off requests.
- Correct their time off.
- View time off balances.
- Record leaves of absence with estimated and flexible end dates.
- View approved time off and leave for their teams and organizations.

Managers can view absences for their teams.

Managers and absence administrators can:

- Approve or deny time off or leave requests.
- Enter time off or leave on behalf of a worker.
- Adjust a worker's time off or leave.
- Return a worker from leave.
- Track and manage time off.
- Monitor the number of times and consecutive days workers are absent during a period and the types of absences they take.
- Assist workers who are on long-term leave of absence or time off, by creating absence cases to track their progress as they reach milestones to rejoining the workforce.

Administrators can define the parameters of your time off, using:

- Time off calculations, business logic, and rules that govern the time off as a period of time.
- Accruals, eligibility rules, carryover amounts, upper and lower limits, and other time off values.

You can use report fields or create calculated fields to build leave of absence rules.

Questions to Consider

Question	Considerations
How does your organization differentiate between short-term and long-term time off?	For configuration purposes, Workday classifies short-term time away from work as time off and long-term as leave of absence. The Absence Calendar Experience simplifies absence requests by merging the tasks for requesting time off and leave of absence. The **Team Absence Calendar** report enables managers and workers to see absence requests for their teams and extended organization to: • Coordinate time off and leave requests. • Manage team resources.
How do you encourage your workers to take time off?	Encouraging workers to take time off: • Ensures that workers make the most of their benefit. • Prevents time off carryover expiring. • Reduces time off liability for accounting purposes. You can create scheduled distributions that send email and mobile push notifications to:

Question	Considerations
	• Workers who you want to remind to take time off based on specific criteria. • Managers and administrators who have time off requests requiring their approval. You can also run reports with completion analytics to find who has taken action on the notifications received within a specific time period.
Do you want to control access to specific time off and leave types?	You can create security segments for time off and leave types to control who can access each type.
How do you want to manage overlapping time off requests?	You can specify and track thresholds for the total number of workers who can take an absence, as well as the total number of hours available to workers. You can configure thresholds for a given day.
How do you want to track time off for your workers?	Workday enables you to set up time off plans that either: • Track balances. A balance period defines the start and end dates of the time off plan. You can identify accruals that add to the plan balance and time offs that subtract from the balance. • Don't track balances. You can specify the unit of time for recording and processing time off requests. The period schedule defines accrual frequencies (except for accruals with a custom frequency), and reporting periods for the plan. You can define eligibility and validation rules and rates of pay for different time off plans.
How do you allocate time off balance when workers are eligible for more than 1 time off plan?	You can create absence tables that include 2 or more tiers, each with a priority order and time off plan. When a worker requests time off, Workday processes time off entries against the highest-priority tier. When the worker exhausts the balance, Workday applies the remaining time against the next tier.
Which payroll application are you using?	If your organization is using Workday Payroll, you can use it to pay time off and leave. Absence Management automatically creates Absence Component Related Calculations (ACRCs) for time off that you can use as inputs in payroll calculations to configure time off earnings. You can also configure a payroll effect for leave of absence to: • Stop paying workers while on leave.

Question	Considerations
	• Configure a run category to pay workers on certain leave types when the payroll effect is enabled for the leave type. If your organization is using a third-party payroll application, you can use payroll interfaces to: • Connect with the payroll vendor. • Send and receive payroll data, including time off and leave information.
How do your absence policies differ between countries?	You can configure time off plans for specific countries, regions, or worker types. Workday also delivers country-specific leave families and their respective leave types. With Workday Payroll for France and Workday Payroll for UK, you can comply with local statutory time off and leave requirements by setting up: • Statutory leave payments. • Time offs for statutory sick pay. • Time offs for holiday pay. You can link a leave type to a statutory leave payment type so that Workday Payroll can process payments based on the leave type. You can configure absence occurrences to report on how many times workers are absent in a period, helping you comply with local regulatory requirements. Absence occurrences are based on absence types.
How do you want to manage worker holiday schedules?	You can set up holiday and work schedule calendars to prevent employees requesting: • Time off on a holiday. • More hours than they're scheduled to work. Workday excludes holidays when calculating the days to include in absence requests, based on time off plans and leave type settings.
How does your organization track hours worked?	You can use Absence Management with or without Time Tracking. You can configure a time off so that workers can: • Request it using the *Request Time Off* business process. • Enter it through Time Tracking. • Use both options.
How often do your time off policies change?	Workday enables you to make effective-dated time off configuration changes due to: • Evolving regulatory, company policy. • Union or collective bargaining agreements.

Question	Considerations
How does your organization manage time off for workers with multiple jobs?	Workday enables you to create position or worker-based time off plans and leaves. You can also add position-based time offs to worker-based time off plans. When you configure time off plans and leaves as position-based, you can't change this setting after time off and leave data exist for the plan or leave type.
How do you track and assist workers who are on long-term time offs and leaves of absence?	Workday enables you to define conditions that automatically initiate absence cases for workers. Workday bases absence case groups on a set number of days of absence in a defined period.
How do you refer to absence, time off, and leave of absence? Do you prefer to use different terminology?	You can create custom labels for these and other absence-related terms, making it easier for you to align absence management with your organization's terminology. Workday displays the custom labels for employee and manager self-service tasks and reports but continues to display the base values for administrator or specialist-related tasks and reports.

Recommendations

Note:

In September 2025, we plan to retire these legacy reports and tasks:

- **Absence Calendar**
- **Place Worker on Leave**
- **Request Leave of Absence**
- **Time Off and Leave Calendar**
- **Time Off Calendar**

To aid in your transition to Absence Calendar Experience on desktop and mobile, Workday recommends that you familiarize yourself and groups of users by configuring the initiating actions for the experience instead. See Steps: Set Up the Absence Calendar Experience on page 2072.

- Validate and test your absence time off and leave component configurations to ensure that you meet statutory requirements.
- To ensure consistency, use the **Global Library** report to search Absence Management rules and configurations when deploying Absence Management in different countries. You can configure time off plans and eligibility rules in multiple ways, which can lead to inconsistencies.
- Use the **Tenant Analyzer** report to get a quick inventory of your payroll, absence, and reporting setup to enable you to:
  - Verify your tenant configuration against Workday recommendations.
  - Troubleshoot performance issues.

Requirements

- Configure the business processes and domain security policies in the Time Off and Leave functional area.
- Create holiday and work schedule calendars.

Limitations

- If you also use Time Tracking, being on leave doesn't automatically prevent an employee from entering worked time. You can build validations within Time Tracking to prevent an employee from entering time when on certain leave types.
- You can only purge absence data for terminated workers and only for these data types:
  - Absence Case Events for Worker
  - Absence Occurrence
  - Worker's Absence Balance Components
  - Worker's Leave of Absence Events
  - Worker's Time Off Events
- Absence data purging validation ensures that you can only purge workers' absence data after several years have passed since their termination date. Example:
  - In the U.S., the amount of time is 3 years.
  - In France, it's 5 years.
  - In the UK, it's 6.
  - In Canada, it's 7.
- The Absence Third-Party Calendar integration with Microsoft Outlook only works with Microsoft Exchange Online. Workday doesn't support hybrid deployments of on-premise Microsoft Exchange Server and Microsoft Exchange Online when setting up the integration.

Tenant Setup

You can configure tenant-wide settings for leave of absence and time off in the **Edit Tenant Setup - HCM** task to:

- Control the display of absence thresholds on calendars.
- Control whether workers can edit the time off type when they correct an approved time off request.
- Edit absence setup components with an effective date older than 12 months such as accruals, time offs, and time off plans.
- Hide total balances on absence tasks.
- Overlap workers in the same position when the incumbent starts a leave of absence.

Security

To view the different security domains for Absence, access the **Domain Security Policies for Functional Area** report and select the Time Off and Leave functional area.

Security domains in the Time Off and Leave functional area enable users to:

- Set up and administer time off and leave plans.
- Manage who can request specific time off and leave types through eligibility, validations, segmented security, and absence thresholds.
- Set up and administer absence entitlements for both time off and leave plans, and define carryover limit and expiration rules for time off plans.
- View worker absence balances including projections and carryover balances.
- View worker time off and leave taken, including absence occurrences.
- Define time off and leave visibility for teams, managers, and administrators (including third-party calendar integrations).

You can restrict access to designated time offs and leave types, including time offs that are part of an absence table, to members of segment-based security groups.

Workday displays details of the time off and leaves type segments in your tenant and their associated time offs, leave types, and security groups on these reports:

- **All Time Off Security Segments**

- **All Leave Type Security Segments**

You can ensure that members of a security group have access to all time offs and leave types, including those restricted to segment-based security groups, by securing the group directly to these domains, respectively, in the Time Off and Leave functional area:

- *Access Time Off (Segmented)* domain.
- *Access Leave Type (Segmented)* domain.

Business Processes

Business Process	Considerations
Absence Calendar (Legacy)	Enables managers and workers to submit and correct absence requests from the legacy **Absence Calendar** report.
Absence Case Event	Enables you to enter absence cases for workers who are on long-term leave of absence or time off.
Assign Work Schedule	Workday uses calendar rules to assign work schedule calendars to workers automatically. This business process enables you to override calendar rules and manually assign work schedule calendars to individual workers.
Correct Time Off	Enables administrators, managers, or workers to make a correction to an employee's time off.
Request Leave of Absence	Enables you to enter a leave of absence request for a worker.
Request Return from Leave of Absence	Enables you to enter a return from leave of absence request for a worker.
Request Time Off	Enables you to enter time off for a worker.

Reporting

To view the available reports for Absence Management, access the **Workday Standard Reports** report, and select 1 of these report categories:

- *Set Up Time Off and Leave*
- *Time Off and Leave*

Reports or Dashboards	Considerations
Absence Tier Time Off Entry Details	View absence tier usage by worker time off requests. You can also use the report to confirm that tier priority is working correctly. The report indicates reevaluated events.
All Time Off Plans	Verify the configuration of time off plans as of the effective date, including: • Their balance periods, carryover limits, period schedules, and units of time. • Whether to process accruals as of the beginning or end of the period. • Which accruals add to the balance and time offs that reduce the balance.

Reports or Dashboards	Considerations
All Time Offs	View all time offs and: • Their related time off plan, time off type, unit of time. • Their eligibility and scheduling rules. • Whether they allow adjustments or overrides, negative time off limits, and data entry validations for time off requests.
All Accruals	View accruals and: • Their related time off plan, unit of time, and limit amounts. • Their eligibility, scheduling, and calculation rules. • Whether they allow adjustments or overrides.
All Leave Families	View all the leave families that you can use to group leave types so that workers can easily find and select the types when requesting leave of absence.
Evaluate Absence Eligibility	Test whether a worker is eligible for time off plans, accruals, or time offs as of a selected date.
Evaluate Absence Calculation	Verify whether you configured accruals correctly and identify discrepancies in your configuration.
Leave Results for Worker **Leave Results for Organization**	Use to predict trends and plan for costs of workers being on a leave of absence.
My Team's Upcoming Time Off	Use to view all upcoming time off for workers in organizations that you manage or support, enabling you to allocate resources and plan for future time off.
Team Absence Calendar	Use to analyze absence requests so that you can better manage team resources.
Time Off Liability	View the liability of an organization for time off balances. For the time off plans and date you select, Workday reports the plan balance and total liability for each worker.
Time Off Liability for Position	View your liability for time off plan balances for employees' positions in the supervisory organizations that you select.
Time Off Results Detail	View detailed time off information for workers in a single processing period.
Time Off Results Summary	View high-level time off information for workers in the processing periods and organizations that you select.
My Time Off Results by Period **Time Off Results by Period**	View accruals, paid, and unpaid time off for each period.

Reports or Dashboards	Considerations
Time Off Results by Period for Workers	
Time Off Approvers with Events Awaiting Action	Use to identify approvers who have unapproved time off events awaiting their action.
View Absence Occurrences Detail	View individual occurrences for workers.
View Absence Occurrences Summary	View the number of times workers are absent per absence type.
Workers on Leave	Use to predict trends and plan for costs of workers being on a leave of absence.
Workers Returning from Leave	Identify workers returning from leave and check that you've correctly configured payroll for them.

Integrations

Web Service	Considerations
Adjust Time Off	Correct existing time off entries.
Enter Time Off	Add new time off entries.
Get Absence Inputs	Get information for accrual and time off adjustments and overrides for specific employees or batch identifiers.
Get Carryover Override	Get carryover expiration or limit overrides for workers for time off plans.
Get Override Balances	Get time off plan override balances for employees.
Get Time Off Plan Balances	Get the time off plan balances by worker.
Import Request Leave of Absence Events *Import Request Return from Leave of Absence Events*	Load a batch of either: • Request Leave of Absence events. • Return from Leave of Absence events. Workday processes the batch in a background process to retain only valid events. When you load business process events using these web services, they complete automatically. When using Enterprise Interface Builder (EIB), you can upload data from a spreadsheet into Workday. The spreadsheets contain worksheets for either the *Request Leave of Absence* or *Request Return from Leave of Absence* business processes. Enter: • Header keys on the **Import Request Leave of Absence** or **Import Request Return from Leave** tab. • The same header key on each row on the corresponding **Request Leave of Absence Event** or **Request Return from Leave Event** tab, if you want to group all events in the same batch. The header key is a unique identifier for a batch.

Web Service	Considerations
	• A different line key for each event that's part of the same header key on the **Request Leave of Absence Event** or **Request Return from Leave Event** tab.
Import Time Off Request Event Batch	Load data from the spreadsheet into Workday. Before loading the data: • Change the line key when the worker changes. • Complete required business process tasks and approvals to confirm the new data values for workers. • Don't include time off requests more than 99 weeks old. • Enter a line key for each worker. • Use the same header key for all requests for individual workers. You can use multiple header keys.
Put Absence Input	Add new accrual and time off adjustments and overrides for specific employees or batch identifiers, or update existing adjustments and overrides.
Put Carryover Override	Add or update new carryover expiration or limit override records for a specific worker and time off plan.
Put Override Balance	Add or update time off plan override balance records for a specific worker and time off plan.
Request Leave of Absence	Add new leave of absence requests. This web service uses the *Request Leave of Absence* business process event and its subprocesses.
Request Return from Leave of Absence	Add return from leave of absence requests. It uses the *Request Return from Leave of Absence* business process event and its subprocesses.

Workday also provides an Absence integration with Google Calendar and Microsoft Outlook. You can create an integration system using the *Absence Third-Party Calendar* template and configure it to send approved time off events from Workday to these online third-party calendars. When you run the integration, Workday automatically creates, updates, and removes approved time off entries, corrections, and cancellations in these third-party calendars.

Connections and Touchpoints

Touchpoint	Considerations
Time Tracking	You can enable employees to enter their time off through Time Tracking or Absence Management.
Workday Assistant	Set up the Workday Assistant chatbot to enable users to: • Request time off. • View their time off balances.

Touchpoint	Considerations
	• View holiday schedules. You can also enable Workday Assistant in Workday for Slack to access quick time off actions.
Workday Learning	Workday validates whether workers have approved time off or leave of absence requests that conflict with scheduled course offerings.
Workday HCM	Absence Management uses employee data such as work location, seniority, employee type, or position for eligibility rules. You can configure the *Change Job* business process to transfer balances for employees automatically when they become eligible for a different time off plan.
Workday Payroll	You can configure Workday to pay out absence balances to an employee automatically on termination.
Workday Scheduling	You can define whether Workday counts time off or holiday time towards working hours for the week. You can then apply that configuration to scheduling validations so that they take time off and holiday time into account.

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information
Concepts

Setup Considerations: Absence Calendar
Setup Considerations: Time Off Plans on page 2084
Setup Considerations: Time Off on page 2092
Setup Considerations: Time Off Adjustments on page 2247
Setup Considerations: Accrual Adjustments and Overrides on page 2288
Setup Considerations: Leave of Absence on page 2342
Setup Considerations: Absence Occurrences on page 2408
Setup Considerations: Absence Balances on page 2301
Setup Considerations: Period Schedules on page 2156
Setup Considerations: Time Off Calculations for Payroll

Tasks

Steps: Set Up the Absence Calendar on page 2080
Steps: Set Up Time Off Plans on page 2102
Steps: Set Up Segmented Security for Time Off on page 2108
Steps: Set Up Time Off Notifications on page 2223
Steps: Set Up Leave of Absence on page 2351
Steps: Set Up Absence Occurrences on page 2413
Steps: Set Up Absence Third-Party Calendar Integration
Create Custom Labels

Reference

2023R2 What's New Post: Custom Labels for Absence

The Next Level: Absence Engagement
The Next Level: Absence Minded: A Better Way to Manage Absences
The Next Level: Absence Effective Dating
The Next Level: The Calculation Engine Behind Absence Management:
The Next Level: Overview of Primary Position Designation Impact
The Next Level: Day in the Life: Absence Administrator

Steps: Enable Absence for Mobile

Prerequisites

Security: *Set Up: Time Off (General)* domain in the Time Off and Leave functional area.

Context

You can enable workers to request, correct, and cancel time off requests from their mobile devices. Reviewers can approve, deny, revise, and send back time off on mobile through My Tasks. You can also enable workers to request leave of absence on their mobile devices. On mobile, the Absence Calendar Experience provides:

- A single calendar to request time off and leave of absence.
- Team absence information to help self-service users make informed requests.

When you enable Absence for mobile with Workday Scheduling, when users select **Schedule** > **Schedule Settings** > **Request Unavailable Time**, we display either the **Request Absence** task or the legacy **Time Off Calendar** report, depending on the business process security policy configuration.

Steps

1. Enable workers to request time off from mobile devices.
   a) Edit the security policy for the *Request Time Off* business process.
   b) Add self-service security groups to the *Request Time Off for Self* initiating action.
2. Enable workers to cancel time off from mobile devices.
   a) Access the business process security policy for the *Request Time Off* business process.
   b) In the **Who Can Do Actions on Entire Business Process** section, add the *Initiator* security group to the *Cancel* action.
   c) Access the *Self-Service: Time Off* domain security policy.
   d) Edit the domain security policy and grant self-service security groups **Modify** and **View** access.
3. Enable workers to correct time off from mobile devices.
   a) Access the business process security policy for the *Correct Time Off* business process.
   b) Add self-service security groups to the *Edit Time Off for Self* initiating action.
   c) In the **Who Can Do Actions on Entire Business Process** section, add the *Initiator* or *Employee-as-Self* security groups.
4. Enable workers to request leave of absence on mobile devices.
   a) Access the business process security policy for the *Request Leave of Absence* business process.
   b) Add self-service security groups to the *Request Leave for Self* initiating action.
5. Enable workers to view balances on mobile devices.

   Edit the domain security policy for the *Self-Service: Time Off Balances* domain and grant self-service users **View** and **Modify** access.
6. Verify segmented security for time off and leave types.

   If you've configured segmented security for time off and leave types in your tenant, verify the configurations for the security segments to ensure that they support your Absence Calendar

Experience configuration on mobile. These segments define the time offs or leave types that users can select when requesting absence.

Ensure that you configure the segment-based security groups in authentication policies if you encounter issues with users being unable to select absence types on mobile.

See:

- Steps: Set Up Segmented Security for Leave Types
- Steps: Set Up Segmented Security for Time Off
- Steps: Set Up Authentication Policies

Steps: Set Up Absence Thresholds

Prerequisites

Security: *Set Up: Absence Threshold Schedule* domain in Time Off and Leave functional area.

Context

Specify and track the threshold for the total number of workers who can take an absence, as well as the total number of hours available to workers. You can configure thresholds for a given day.

Steps

1. Access the **Edit Tenant Setup - HCM** task.
2. Select **Display Absence Thresholds** in the **Time Off: Threshold** area.

   You can configure when thresholds display to your workers. You can also display the thresholds as a percentage, number, or threshold name.
3. Access the **Create Absence Threshold Schedule** task.
4. As you complete the task, consider:

Field	Description
Display Name	Enter a name for the absence threshold that displays to your workers on their calendars and validation messages.
By Organization	You can only create and edit absence threshold schedules for the organizations to which you have security permissions.
Validation Severity	The *Warning* option displays a warning to a worker when the worker's time off request exceeds the threshold quantity. Select this option if you want workers to proceed even when the request exceeds the threshold quantity. The *Critical* option displays an error to a worker when the worker's time off request exceeds the threshold quantity. Select this option if you want to prevent workers from requesting time off when the request exceeds the threshold quantity.
Unit Type	Select **Headcount** to define the number of workers that are out of the office before you reach the absence threshold.

Field	Description
	Select **Hours** to configure the collective total hours of absence before you reach the threshold.
Absence Types with Threshold Validations	Time off and absence tables included in the absence threshold count towards the threshold. Threshold validations display if workers request a time off against any of the types in this field after they exceed or meet the threshold.
Absence Types without Threshold Validations	Time off, absence tables, and leave types included in the absence threshold count towards the threshold. Workday doesn't display threshold validation if workers request time off or leave against any of the types in this field even if they exceed or meet the threshold.
Set Daily Quantity	This field displays with a default value of zero when you select the **Unit Type**. If you don't edit the value in this field, Workday selects the **No Threshold Limit** check box for all days of the week.
Threshold Quantity	Enter your threshold quantity of workers, or hours, for the appropriate days of the week.

5. (Optional) Enter an override if necessary. Example: You set up a threshold of 4 headcounts for all days. On December 22 and 23, you want to ensure that there are more staff available so you set the threshold for those days to 2.

   Users with unconstrained security access can update all fields on absence threshold schedules with a start date, end date, or both in the past. Users with constrained security can rename, and add override dates to, absence threshold schedules with a start date in the past.

Next Steps

Run the **All Absence Threshold Schedules** report to view the configuration for each schedule.

Run the **View Absence Threshold Results** report to view details of absence threshold schedules by organization within a date range.

Access the **Copy Absence Threshold Schedule** task to clone your threshold schedule.

Access the **Delete Absence Threshold Schedule** task to delete threshold schedules.

Related Information
Concepts

Setup Considerations: Leave of Absence on page 2342

Reference

Reference: Leave Impacts on page 2373

2021R2 What's New Post: Absence Thresholds

The Next Level: Absence Thresholds

Concept: Absence and Time Off Terminology on the Worker Profile

In some regions in which you operate, the term absence is more meaningful than time off and leave of absence. Example, when you translate absence into other languages.

The *Self-Service: Worklets: Absence* domain provides access to the **Absence** worklet. To provide a consistent user experience, Workday changes the terminology on absence-related tasks, reports, and worklets that you can access on the worker profile on desktop and mobile, based on whether you've access to the *Self-Service: Worklets: Absence* domain. This domain access controls the terminology that you see when viewing your own records and other worker's records. You can navigate other worker profiles in the context that's familiar to you as the logged-in user. Workday renames:

- The **Time Off for Worker Profile** group to **Absence for Worker Profile**.
- **Time Off Balance** on the **Time Off** worker profile group to **Absence Balance**.
- **Time Off and Leave Requests** on the **Time Off** worker profile group to **Absence Requests**.
- The **Time Off** worklet on the mobile Home page to **Absence** so that it's consistent with desktop.

When users don't have access to the *Self-Service: Worklets: Absence* domain worklet, Workday displays the **Time Off** worklet on their Home page and its related **Time Off** profile and report labels.

By default, when you enable Absence for mobile, users have access to the **Time Off** worklet on mobile devices.

Related Information
Reference
2022R2 What's New Post: Absence User Interface

Reference: Tenant Analyzer

The **Tenant Analyzer** (secured to the *Set Up: Tenant Setup - Tenant Analyzer* domain in the System functional area) is a preconfigured profile of reports for reviewing your payroll, absence, reporting, and financial management configurations to enable you to:

- Verify your tenant configuration against Workday recommendations.
- Troubleshoot performance issues.

As your tenant grows, you can also use **Tenant Analyzer** to get a quick inventory of your payroll, absence, reporting, and financial management setup.

Absence Profile Group

Report	Description	Example Use
Validations	Displays absence configurations that don't meet Workday recommendations. Security: *Set Up: Time Off (General)* domain in the Time Off and Leave functional area.	Identify and resolve accruals that are missing a time off plan.
Calculation Exception Audit	Displays the number calculations with exceptions. You can drill down on the	Identify and resolve calculations that reference other calculations

Report	Description	Example Use
	number to view and resolve exceptions. Security: • *Set Up: Time Off (Calculations - Generic)* domain in the Time Off and Leave functional area. • *Set Up: Calculations - Generic* domain in the Core Payroll functional area.	with a different category.

Payroll Profile Group

Report	Description	Example Use
Pay Groups	Displays all pay groups and related configuration, such as: • Number of employees. • Run category. • Gross and net pay accumulations. • Period schedule. Security: *Set Up: Payroll - Pay Group Specific* domain in the Core Payroll functional area.	Verify that all pay groups use the same gross and net pay accumulations.
Accounting	Displays all account posting rule sets and related	Identify any companies and rule types associated with account

Report	Description	Example Use
	configuration, such as: • Posting rules. • Posting rule conditions. • Condition dimensions. Security: *Set Up: Payroll - Company Specific (Accounting)* domain in the Core Payroll functional area.	posting rule sets.
Validations	Displays payroll configurations that don't meet Workday recommendations. Security: *Set Up: Payroll* domain in the Core Payroll functional area.	Identify any pay groups that have no calculated pay periods, and investigate whether you need them.
Calculation Exception Audit	Displays the number of payroll calculations with exceptions. You can drill down on the number to view and resolve exceptions. Security: • *Set Up: Time Off (Calculations - Generic)* domain in the Time Off and Leave functional area. • *Set Up: Calculations*	Identify and resolve deductions that are retrieving values from benefit plans they aren't associated with.

Report	Description	Example Use
	- *Generic* domain in the Core Payroll functional area.	
PCGs for Payroll Calculations	Displays payroll calculations and their associated pay component groups. Security: *Set Up: Payroll (Calculations - Payroll Specific)* domain in the Core Payroll functional area.	Verify that a pay component is in all of the appropriate pay component groups.
Results/Result Lines	Displays these statistics for each pay group: • Results. • Result lines. • Related result lines. Security: *Reports: Pay Calculation Results for Pay Group (Results)* domain in the Core Payroll functional area.	Identify any pay groups with more results than expected and investigate whether you can optimize the run criteria.

Reporting Profile Group

Report	Description	Example Use
Payroll Reporting Validations	Displays custom reports that use data sources for which an equivalent indexed data source filter is available.	Identify custom reports that you can update to improve performance.

Report	Description	Example Use
	Security: *Set Up: Payroll* domain in the Core Payroll functional area.	

Performance Profile Group

Report	Description	Example Use
Payroll Performance Validations	Displays payroll configurations that don't meet Workday recommendations. Security: *Set Up: Payroll* domain in the Core Payroll functional area.	Identify run categories that don't use a specific status and use a generic Active or Terminated status instead.

Financials Profile Group

Report	Description	Example Use
Financials Accounting Configuration	Displays all account posting rule sets and related configuration, such as: • Posting rules. • Posting rule conditions. • Condition dimensions. Security: • *Set Up: Funding Sources* domain in the Financial Accounting functional area. • *Set Up: Matching Rule Set* domain in the	Identify any companies and rule types associated with account posting rule sets.

Report	Description	Example Use
	Banking and Settlement and Financial Accounting functional areas. • *Set Up: Payroll - Company Specific (Accounting)* domain in the Core Payroll functional area.	
Financials Tenant Analyzer Validations	Displays financial management configurations that don't meet Workday recommendations. Security: *Set Up: Time Off (General)* domain in the Time Off and Leave functional area.	Identify companies with no open ledger period.

Related Information
Tasks
Steps: Set Up Profiles and Profile Groups

Absence Calendar Experience

Setup Considerations: Absence Calendar Experience

You can use this topic to help make decisions when planning your configuration and use of the Absence Calendar Experience. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Absence Calendar Experience simplifies absence requests by merging the tasks for requesting and managing time off and leave of absence on desktop and mobile.

Business Benefits

Absence Calendar Experience provides a unified user experience where you have fewer tasks to become familiar with. You can request and view your absence and balances from wherever you are in Workday. On desktop, you can request absence on a micro calendar that keeps you in the context of the page you're working on. On mobile, you can use a single calendar to request time off and leave of absence.

You can:

- Roll out Absence Calendar Experience using a phased approach across your organization.
- Quickly create and view requests for time off and leave of absence in a unified task. When requesting and correcting absence on behalf of other workers, you have the same familiar experience as requesting or correcting absence for yourself.
- Easily view balances as of the current date or as of the end of the calendar year.
- View absence table tier time off balances.
- Use a date-range option to make long-duration requests easier.

Absence Calendar Experience supports:

- Absence type grouping, making it easy for you to identify the type of absence you want to request.
- Display of instructional information that you can configure as help text on Absence business processes. Example: You can include links to absence policies for your organization.

Absence Calendar Experience tasks display:

- The worker's available balance, which includes accrued and future requests, and the remaining balance after you submit the request.
- Team absence information, which helps self-service users make informed requests. Workers can access a list view of the upcoming time off or leave of absence of their team members. The calendar uses different colors to highlight the status of each request and team absence information.

Use Cases

Administrators and managers can:

- Rescind leave events from the calendar.
- Request time off and leave on behalf of a worker that they support.
- Correct or edit time off requests on behalf of a worker.

  Note: Workday doesn't support corrections or edits of leave of absence requests by managers or workers. However, administrators can correct leave of absence requests for workers as a related action on the request.

Managers can:

- Drill into approved absence request for members of their team.
- Edit time off events directly from a team absence calendar.

Workers can:

- Request time off and leave.
- Correct or edit time off.
- Cancel time off and leave.
- Edit the position, quantity, reason, and type for individual time off entries within a time off request.
- Add additional information and supporting data and attachments for absence requests.

Questions to Consider

Questions	Considerations
Who do you want to be able to enter time off or leaves of absence for workers?	With Absence Calendar Experience, managers and workers can submit and correct absence requests. You can enter absence requests for your workers when your policies require that an absence administrator or manager enter time off or leaves for workers. Consider whether other organizations, such as Payroll, have sufficient access to enter time off or leave for workers.
Who do you want to be able to view time off and leave events within an organization?	With the **Configure Team Absence** task, you can enable other roles or teams to view absence requests on the **Team Absence Calendar**.
Do you want to roll out Absence Calendar Experience on a phased basis?	If you want a more tailored approach to roll out, you can control which users or populations have access to Absence Calendar Experience. You can restrict access by security group on initiating actions that use the: • **Manage Absence** report. • **Request Absence** task.
After you terminate workers, do you want to enable managers or Absence administrators to manage their absence history?	With Absence Calendar Experience, you can enable managers and Absence administrators to edit time off and enter time off and leave requests from the Worker profiles of the terminated workers as **Time and Absence** related actions. Manager and administrator access is based on membership of security groups on the business process security profile for these initiating actions: .

Recommendations

In September 2025, we plan to retire these legacy reports and tasks:

- **Absence Calendar**
- **Place Worker on Leave**
- **Request Leave of Absence**
- **Time Off and Leave Calendar**
- **Time Off Calendar**

To aid in your transition to Absence Calendar Experience on desktop and mobile, Workday recommends that you familiarize yourself and groups of users by configuring the initiating actions for the experience instead. See Steps: Set Up the Absence Calendar Experience on page 2072.

As we plan to retire the **Time Off and Leave Calendar**, we advise that you use the more flexible **Team Absence Calendar** report, which enables you to edit time off requests as part of the new experience. See Steps: Set Up the Team Absence Calendar on page 2074.

Requirements

To use Absence Calendar Experience, provide access to the initiating actions described in the Business Processes section. Add the security groups that have permission to start each of the initiating actions. As you're ready to uptake the experience, or roll out access in stages across your organization, remember to remove security from the other legacy initiating actions in the *Correct Time Off*, *Request Time Off*, and *Request Leave of Absence* business processes, and in the legacy *Absence Calendar* business process. See Reference: Absence Calendar Experience Comparison.

Review the **Current Delegations** report to ensure that you update active delegations, where necessary, to use the initiating actions for Absence Calendar Experience.

Limitations

On mobile, you can't request absence (either time off or leave of absence) on behalf of another worker. However, you can request absence for yourself.

You can't configure help text for the **Manage Absence** report because the main calendar view uses the help text for the legacy *Absence Calendar* business process, which we plan to retire. However, you can configure help text to display in the **Request Absence** micro calendar, based on the type of absence and the respective business process.

Tenant Setup

Use the **Edit Tenant Setup - HCM** task to configure the tenant-wide **Balances as of date in the New Absence Calendar Experience** option.

Security

If you've configured segmented security for time off and leave types in your tenant, verify the configurations for the security segments to ensure that they support your Absence Calendar Experience configuration. These segments define the time offs or leave types that users can select when requesting or entering absence. See:

- Steps: Set Up Segmented Security for Time Off.
- Steps: Set Up Segmented Security for Leave Types

Grant access to security groups on the initiating actions that use the tasks for managing and requesting absence on the security policies for these business processes:

- *Correct Time Off*
- *Request Leave of Absence*
- *Request Time Off*

Review the policy restrictions, attachment settings, and related links to ensure that they're correct. Once your entire organization is using Absence Calendar Experience, you can remove all security groups from the legacy initiating actions.

Business Processes

Business Processes	Considerations
Correct Time Off	Enables you to edit your time off or edit time off on behalf of a worker you support. The initiating actions for Absence Calendar Experience include: • *Edit Time Off for a Worker* • *Edit Request Time Off for Self*
Request Leave of Absence	Enables you to enter leave of absence requests for yourself or on behalf of a worker you support. The initiating actions for Absence Calendar Experience include: • *Request Leave for a Worker*

Business Processes	Considerations
	• *Request Leave for Self*
Request Time Off	Enables you to request time off for yourself or on behalf of a worker you support. The initiating actions for Absence Calendar Experience include: • *Request Time Off for a Worker* • *Request Time Off for Self*

Reporting

Reports or Dashboards	Considerations
Manage Absence	Use to view another worker's absence calendar, review and edit their absence, or request absence on their behalf.
Team Absence Calendar	Use to analyze absence requests so that you can better manage team resources.

Connections and Touchpoints

Touchpoint	Consideration
People Experience	You can configure Absence-related cards on the Home page to include tasks based on security-group access to the initiating actions on the *Correct Time Off*, *Request Leave of Absence*, and *Request Time Off* business process security policies. Access to the initiating actions for Absence Calendar Experience takes precedence. When users have access to only those initiating actions, we display links to these tasks and reports: • **Manage Absence** (on the Upcoming Time Off card on desktop and mobile). • **Manage Absence** with the **View Teams** button (on the Upcoming Team Absences card). • **Team Absence Calendar** (on the View Upcoming Team Absences card for employee self-service). • **Team Absence Calendar** (on the View Upcoming Team Absences card for managers).
Time Tracking	In Time Tracking, users can access Absence-related menus from the **Actions** button on the **Enter My Time** report and **Enter Time for Worker** task based on: • Security-group access to the initiating actions on the *Request Time Off* business process security policy. • Whether the time off configurations have the *Time Tracking and Time Off* entry option. You can configure the Absence card on the **Time and Scheduling Hub** to include tasks based on security-group access to the initiating actions on the *Correct Time Off*, *Request Leave of Absence*, and *Request Time Off* business process security policies. Access to the initiating actions for Absence Calendar Experience takes precedence. When users have access to only those initiating actions, or to both those and the legacy initiating actions, we display the: • **Manage Absence** report.

Touchpoint	Consideration
	• **Request Absence** task. The *Return Worker from Leave* initiating action is available for all configurations.
Workday Assistant	Workday displays a **Manage Absence** link that you can use to correct time off using Workday Assistant.
Workday HCM	The *Change Job business* process includes an *Update Time Off Request* subprocess that creates inbox tasks for assigned users to encourage them to take action on ineligible time offs. You can configure the subprocess as an Action step on the business process. Workday highlights ineligible time offs in red on the calendar. Workday displays a **Manage Absence** button on the inbox task to initiate the *Update Time Off Request* subprocess.

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Other Impacts

If you're:

- Planning to roll out Absence Calendar Experience on a staged basis, be mindful of who has permission to do each action. This can impact other configurations such as who can use worktags on time off.
- Using alerts to prompt users to specific tasks, consider revising your alert configuration to point to the **Request Absence** task and **Manage Absence** report.

Related Information
Examples

2024R1 What's New Post: New Absence Calendar Experience

The Next Level: New Absence Calendar Experience Next Level Series

Steps: Set Up the Absence Calendar Experience

Prerequisites

Review Setup Considerations: Absence Calendar Experience.

Context

You can set up the Absence Calendar Experience to enable:

- Workers to request time off and leave of absence on desktop and mobile.
- Managers and administrators to manage absence request.

Steps

1. Create Custom Business Processes.

   Configure these Absence business processes in the Time Off and Leave functional area:

   - *Correct Time Off*.
   - *Request Leave of Absence*
   - *Request Time Off*

   Note: The *Absence Calendar* business process isn't required. Edit the legacy *Absence Calendar* business process and remove security from its initiating actions as you're ready to uptake the New Absence Calendar Experience.

2. Edit Business Process Security Policies.
    a) Add security groups to the initiating actions on these business process security policies.
        - *Correct Time Off*
        - *Request Leave of Absence*
        - *Request Time Off*
    b) Remove security groups from the legacy initiating actions on these business processes:
        - *Absence Calendar*
        - *Correct Time Off*
        - *Request Leave of Absence*
        - *Request Time Off*
3. (Optional) Specify how to display leave-entitlement balances when using Absence Calendar Experience. For each leave type:
    a) Access the **Edit Leave Type** task.
    b) On the **Balance/Leave Taken** tab, select a display option from the **Calendar Display** field.
4. Set up segmented security for leave types, except if you:
    - Already configured the Access Leave Type (Segmented) domain.
    - Don't want to restrict leave types for groups of workers.

    See Steps: Set Up Segmented Security for Leave Types.
5. (Optional) On the Home page, add these tasks to any existing worklets or dashboards you're using in place of legacy absence or time off tasks:
    - **Manage Absence**
    - **Request Absence**

    You can also add them as apps or worklets to the **View All Apps** section of the Home page to provide faster access from the global navigation menu. See:
    - Steps: Set Up Dashboards and Landing Pages
    - Reference: Home Page Sections
6. (Optional) Access the **Edit Tenant Setup – HCM** task.

    In the **Time Off** section, select either of these default values for **Balances as of date in the New Absence Calendar Experience**:
    - *As of end of calendar year*
    - *As of today*
7. (Optional) Create Custom Labels.

    If your organization doesn't use the term Absence, you can use custom labels to replace this term with an alternative that's appropriate for your organization.
8. (Optional) Enter absence on behalf of a worker using either of these tasks or reports:
    - **Manage Absence**
    - **Request Absence**
9. (Optional) Review the help text for these business processes:
    - *Correct Time Off*
    - *Request Leave of Absence*
    - *Request Time Off*

    Set up help text for steps in these business processes by selecting **Business Process** > **Maintain Help Text** from the related actions menu of the business process definition. Workday displays a link to the help text in the **Request Absence** micro calendar based on the type of absence and the respective business process. Example: When you correct a time off request, we display help text from the *Correct Time Off* business process. See Steps: Configure Business Process Definitions.

10. (Optional) Access the **Current Delegations** report to review delegations in specific organizations.

Ensure that you inform users that they need to update active delegations for legacy initiating actions, where necessary. Replace:

- *Correct My Absence* with *Edit Time Off for Self*.
- *Correct My Time Off* with *Edit Time Off for Self*.
- *Enter Absence* with *Request Time Off for a Worker*.
- *Enter Time Off* with *Request Time Off for a Worker*.
- *Request Absence* with *Request Time Off for Self*.
- *Request Time Off* with *Request Time Off for Self*.

See Delegate My Tasks.

Result

Managers can:

- Request time off and leave for a worker using the **Manage Absence** report or the **Request Absence** task.
- Correct worker absence requests using the **Manage Absence** report.

Workers can:

- Request time off and leave using the **Manage Absence** report or the **Request Absence** task.
- Correct time off using the **Manage Absence** report.

Steps: Set Up the Team Absence Calendar

Prerequisites

- Security: *Set Up: Time Off (General)* domain in the Time Off and Leave functional area.

Context

Note:

In September 2025, we plan to retire the legacy **Time Off and Leave Calendar**. Workday recommends that you use the more flexible **Team Absence Calendar** report, which enables you to edit time off requests as part of the new experience.

Team Absence enables managers and workers to see absence requests for their teams and extended organization from the calendar to:

- Coordinate time off and leave requests.
- Manage team resources.

You create access groups to:

- Define the pool of workers an employee can view on the calendar.
- Select the time off and leave types that an access group can view.

Workday provides 2 views for employees:

- **Manager Self Service:** Managers have access to the **Team Absence Calendar** report, which lists both in-progress and approved absence requests for their teams.
- **Employee Self Service:** Workers can click **View Teams** when requesting absence to view absence requests for their team and other organizations that they have access to. They can only view approved current or future-dated absence requests (not past).

Steps

1. Access the **Configure Team Absence** task.
2. On the **Manager Self Service** tab, create access groups by selecting assignable roles and organization type pairs.

   You can grant access to members of subordinate organizations and workers with Is Leader roles. As you complete this task, consider:

Option	Description
Assignable Role	The assigned roles that have access to the selected organization types. Examples: • Select the *Manager* role and the *Supervisory* organization type so that managers can view requests for their supervisory organizations. • Select the *Absence Partner* role and the *Cost Center* organization type. Workers have access to the members of cost centers in which they have the Absence Partner role assigned.
Organization Types	The organization types that the managers can access, based on their assigned roles.
Subordinate Organizations	The number of lower levels that managers can access, based on the organization in which they have an assigned role.
Leader Roles	Grants access to workers with an Is Leader role for the organization type.

3. On the **Employee Self Service** tab, create access groups by selecting the group criteria and organization types.

   Workers have access to the members of the selected organization types in which they have any of the selected job profiles. You can grant access to members of subordinate organizations and workers with Is Leader roles. As you complete this task, consider:

Option	Description
Group Criteria	Specify whether all workers, or workers with certain job profiles, have access to view approved absence requests for members of the selected organization types.
Organization Types	The organization types that the group can access, both supervisory and nonsupervisory. You can select custom organization types specific to your industry or tenant such as districts and stores. Example: *Store District* and *Store*.
Subordinate Organizations	The number of lower levels that workers can access based on the organization in which they have an assigned role.
Leader Roles	Grants access to members of the group (either all workers or workers with a specific job profile) to view absences of workers in the selected organization types who have an Is Leader role. Workers can view these absences when they either:

Option	Description
	• Select **Actions** > **View Teams** on the **Manage Absence** report. • Click **View Teams** on the **Request Absence** task. Workday automatically includes workers with Is Leader roles when selecting an organization on the **Team Absence Calendar** report.
Always Display Workers on Calendar	Automatically displays team mate absences on your calendar.

4. On the **Time Off Visibility** and **Leave Type Visibility** tabs, select the **Visible for Team Absence** check box for each absence type to display the selected types on the team calendars.

   Note: The security policies for these business processes take precedence over the values that you configure on the **Configure Team Absence** task:

   - *Correct Time Off*
   - *Request Leave of Absence*
   - *Request Time Off*

   In the **Who Can Do Actions on Entire Business Process** section of these business process security policies, users in the **Security Groups** field for the **View All** action can see events on the **Team Absence Calendar**.

   Managers and absence administrators can use **Team Absence Calendar**. For this calendar, the visibility settings on the **Configure Team Absence** task and the **View All** action on the security policies both apply, regardless of whether you configure the business processes.
5. Edit Domain Security Policies.

   Grant permissions on these domains:

Domain	Description
Worker Data: Team Absence Calendar	Permissions on the domain grant access only to the **Team Absence Calendar** report. The access groups that you configure on the **Manager Self Service** tab grant access to specific workers and their time off and leave requests.
Self-Service: Team Absence Calendar	Permissions on the domain grant access only to the **View Team** button. The access groups that you configure in the **Employee Self Service** tab grant access to specific workers and their time off and leave requests.

6. Activate Pending Security Policy Changes.

Example

This example displays how to set up access groups for:

- Managers and workers of supervisory organizations.
- Workers of nonsupervisory, custom organizations.

Mario Morales manages the US and Canadian Property Management organization at his company. To balance resources for his projects, Mario needs to track the absence requests for his employees. He's an assigned role of Manager in both the Property Management - US Group and the Property Management - CAN Group supervisory organizations.

Likewise, the workers in these organizations need to see the approved absences of their teammates to help manage projects and to know when to ask for time off. As the absence administrator, you set up 3 access groups for:

- The manager of a supervisory organization.
- Workers in a supervisory organization that report to the manager.
- Workers in a nonsupervisory, custom organization.

On the **Manager Self Service** tab, you create an access group called *Manager - Supervisory*. On the **Employee Self Service** tab, you create an access group called *Employees - Supervisory*.

Access Group	Members	Organization Types	Supervisory Organizations	Leader Roles
Manager - Supervisory	**Assignable Roles**: *Manager*	*Supervisory*	**Include Subordinate Organizations to Level:** 1	Selected
Employees - Supervisory	**Group Criteria**: *All Workers*	*Supervisory*	**No Subordinate Organizations**	Selected
Store Employees - Custom	**Group Criteria**:**Job Profile**: *Store Clerk*	• *Store District* • *Store*	**No Subordinate Organizations**	Selected

When Mario accesses the **Team Absence Calendar** report, he sees both supervisory organizations listed in the **Organizations** prompt because he's an assigned role in each. He can select 1 or both organizations. He can also select individual members from the **Workers** prompt.

When workers in the *Employees - Supervisory* group requests an absence, they can click **View Teams** on the calendar. The calendar displays the approved requests of their teammates in their supervisory organization.

When workers in the *Store Employees - Custom* group request absence, they can click:

- **View Teams** on the calendar, and select the custom organization types from the **Organizations** prompt. The calendar displays the approved requests of their teammates in the custom organization.
- **Worker** to view individual workers, after they clear the **Organization** prompt.

You can use the **Configure Worklet** task to:

- Add the **Team Absence Calendar** report to the **My Team** worklet.
- Remove the **Time Off and Leave Calendar** from the **My Team** worklet.
- Add the **View Teams** report to the **Time Off** and **Absence** worklets.

Related Information
Concepts

Concept: Security Policies

Concept: Custom Organizations

Tasks

Set Up Assignable Roles

Set Up Nonsupervisory Organizations

Maintain Organization Types

Configure Absence Type Groups

Prerequisites

- Set up Absence Calendar Experience.
- Security: *Set Up: Time Off* domain

Context

Workers often have to look through many types of absence types when submitting an absence request. You can create absence types to group together similar types of time offs, leave types, or absence tables. Example: You can create an absence type group called Vacation. You might include Floating Holiday and PTO in the same group.

Steps

1. Access the **Configure Absence Type Groups** task.
2. Add a row for each absence type group. As you complete this task, consider:

Option	Description
Group ID	Enter a unique name for the group. Workday displays this name if you don't provide a **Display Name**.
Absence Type	Select one or more absence types from the list. This list includes all absence tables, time offs, and leave types. Each absence type can belong to only 1 group.
Display Name	An intuitive name that helps workers select the correct group of absence types.

Result

When users request an absence, they have a much shorter list of absence types to select from, reducing the need to correct requests. Workers see the grouped interface only if they're eligible for at least 1 absence type that belongs to a group. Workday automatically creates a group called Other Absence Types for absence types that don't belong to a group.

Related Information
Tasks

Create Leave Types on page 2356

Create Time Off Types on page 2121

Concept: Absence Calendar Experience

The Absence Calendar Experience simplifies absence requests by merging the tasks for requesting time off and leave of absence on desktop and mobile. You can manage absence requests using these reports, tasks, or related actions on a worker:

- **Manage Absence**
- **Request Absence**

When they request absence, workers can select from a combined list of time off and leave types, collectively known as absence types. They don't have to distinguish between time off or leave types. If you want workers to be able to distinguish between time off or leave types, you can configure absence type groups to group related absence types together.

You can use this combined approach instead of the legacy Time Off and Leave calendar that distinguishes between time off and leave types. Unlike the legacy unified Absence Calendar, Absence Calendar Experience provides a consistent experience across desktop and mobile. You configure access to Absence Calendar Experience on the initiating actions of the respective business process security policies.

Business Process Security Policy	Initiating Action
Correct Time Off	• *Edit Time Off for a Worker* • *Edit Time Off for Self*
Request Leave of Absence	• *Request Leave for a Worker* • *Request Leave for Self*
Request Time Off	• *Request Time Off for a Worker* • *Request Time Off for Self*

Reference: Absence Calendar Experience Comparison

Compare the configuration and functionality of Absence Calendar Experience with the legacy Time Off and Leave and Absence Calendar.

Configuration/Functionality	Legacy Time Off Calendar and Leave of Absence Tasks		Legacy Abse
Absence Types	Time Off Request	Leave	Time Off
Business Processes	• *Correct Time Off* • *Request Time Off*	• *Request Leave of Absence* • *Request Return from Leave of Absence*	• *Absence C* • *Correct Tim* • *Request Ti*
Initiating Actions for Self Service Tasks	• *Correct My Time Off* • *Request Time Off*	• *Request Leave of Absence* • *Request Return from Leave of Absence*	• *Request Ab* • *Correct My*
Self Service Tasks	• **Correct Time Off** • **Request Time Off**	• **Request Leave of Absence**	• **Request A** • **Correct My**
Initiating Actions for on Behalf of Tasks	• *Correct Time Off* • *Enter Time Off*	• *Place Worker on Leave* • *Return Worker from Leave*	• *Correct Abs* • *Enter Abse*
On Behalf of Tasks	• **Correct Time Off** • **Enter Time Off**	• **Place Worker on Leave** • **Return Worker from Leave**	• **Correct Ab** • **Enter Abse**
Interactive Calendar Experience?	Yes	No	Yes (Desktop
Self Service Calendar Support on Mobile?	Yes	No	No legacy Abs mobile. Use *C* *Request Time*
Edit Quantity for Individual Days?	No	N/A	Yes

Configuration/Functionality	Legacy Time Off Calendar and Leave of Absence Tasks		Legacy Abse
Edit Reason or Position for Individual Days?	No	N/A	No
Balances Displayed on Calendar Side bar	No	N/A	Yes
Supports Entering Worktags on Time Off	No	N/A	No

Legacy Absence Calendar

Steps: Set Up the Absence Calendar

Prerequisites

Note:

In September 2025, we plan to retire these legacy reports and tasks:

- **Absence Calendar**
- **Place Worker on Leave**
- **Request Leave of Absence**
- **Time Off and Leave Calendar**
- **Time Off Calendar**

To aid in your transition to Absence Calendar Experience on desktop and mobile, Workday recommends that you familiarize yourself and groups of users by configuring the initiating actions for the experience instead. See Steps: Set Up the Absence Calendar Experience on page 2072

Configure these business processes in the Time Off and Leave functional area:

- *Correct Time Off*
- *Request Leave of Absence*
- *Request Time Off*

Context

If your organization doesn't distinguish between time off and leave of absence, you can set up the *Absence Calendar* business process. With the *Absence Calendar* business process, managers and workers submit and correct absence requests from the Absence Calendar.

You can enter an absence request for your workers when your policies require that an absence administrator or manager enter time off or leaves for workers.

Steps

1. Create Custom Business Processes.

   Configure the *Absence Calendar* business process in the Time Off and Leave functional area.
2. (Optional) Select **Business Process** > **Maintain Related Links by Definition** from the related actions menu of the *Absence Calendar* business process.

   Configure related links, such as links to regulatory documents. Include *http://* or *https://* in the URL.

   Security: These domains in the System functional area:

   - *Business Process Administration*
   - *Manage: Business Process Definitions*

3. Edit Business Process Security Policies.
   a) Add security groups to the initiating actions on the *Absence Calendar* business process security policy.
   b) Clear the fields for **Who Can Do Action Steps in the Business Process**.
   c) Remove security groups from the initiating actions on these business processes:

      - *Correct Time Off*
      - *Request Leave of Absence*
      - *Request Time Off*

      Note: Don't remove the security groups from web service initiating actions.
   d) Configure the **Policy Restrictions** settings to coordinate with the policy restrictions of the other business processes.

      The policy restrictions on the new *Absence Calendar* business process control what happens before workers click **Submit** for an absence request or correction.

      The policy restrictions on the *Request Time Off*, *Request Leave of Absence*, and *Correct Time Off* business processes control what happens after workers click **Submit**.
4. (Optional) Specify how to display leave entitlement balances on the **Absence Calendar**.

   For each leave type:
   a) Access the **Edit Leave Type** task.
   b) On the **Balance/Leave Taken** tab, select a display option from the **Calendar Display** field.
5. Edit Domain Security Policies.

   Set up the security policy on the *Self-Service: Worklets: Absence* domain in the Time Off and Leave functional area.
6. Set up leave segment security, except if you:

   - Have already configured the *Access Leave Type (Segmented)* domain.
   - Don't want to restrict leave types for groups of workers.

   See Steps: Set Up Segmented Security for Leave Types on page 2352.
7. (Optional) On the Home page, add the **Absence** worklet and remove the **Time Off** worklet.

   See Steps: Set Up Dashboards and Landing Pages.
8. (Optional) Enter an absence on behalf of a worker.
   a) Access the **Enter Absence** report.
   b) Select the days for the absence. As you complete the task, consider:

Option	Description
Type	Displays the absence types and absence tables that the worker is eligible for on the request date. Or, on the first day of the request if you select multiple dates. Absence types include absence tables, time off plans, and leave types. In the same request, you can select multiple time off types or absence tables, but not multiple leave types.
Position	Displays only if the absence is associated with a position-based plan. When a worker has only 1 position that's eligible for the absence, Workday displays it automatically. A plus sign (+) after a position name identifies it as a secondary position.

Option	Description
Quantity per Day	Can apply to each date requested; the worker can also change the quantity for a date. Example: If Mary is taking 2 days off from a daily plan, enter *2*. If she's taking 8 hours off each day and the plan is hourly, you can enter *8*. If you defined a **Daily Quantity Default**, Workday displays *Variable Quantity*, or a default value based on the first day of the request.

Result

Managers can:

- Request time off and leave for a worker using the **Enter Absence** task.
- Correct worker absence requests using the **Correct Absence** task.
- View display balances by leave entitlement type on the **All Leave Families** report.
- Enter an absence request for another worker.

Workers can:

- Request time off and leave using the **Request Absence** task.
- Correct time off requests using the **Correct My Absence** task.

Next Steps

Set up time off plans and leave types.

Related Information
Concepts
Concept: Absence Calendar on page 2082
Tasks
Steps: Set Up Leave of Absence on page 2351
Steps: Set Up Time Off Plans on page 2102
Reference
2022R2 What's New Post: Absence User Interface
The Next Level: Absence Minded - A Better Way to Manage Absences
The Next Level: Day in the Life: Absence Administrator

Concept: Absence Calendar

Note:

In September 2025, we plan to retire these legacy reports and tasks:

- **Absence Calendar**
- **Place Worker on Leave**
- **Request Leave of Absence**
- **Time Off and Leave Calendar**
- **Time Off Calendar**

To aid in your transition to Absence Calendar Experience on desktop and mobile, Workday recommends that you familiarize yourself and groups of users by configuring the initiating actions for the experience instead. See Steps: Set Up the Absence Calendar Experience on page 2072.

As we plan to retire the **Time Off and Leave Calendar**, we advise that you use the more flexible **Team Absence Calendar** report, which enables you to edit time off requests as part of the new experience. See Steps: Set Up the Team Absence Calendar on page 2074.

The **Absence Calendar** and the related actions merge the tasks for requesting time off and leave of absence. You can manage absence requests from the calendar using these tasks or related actions (from the worker):

- **Correct Absence**
- **Correct My Absence**
- **Enter Absence**
- **Request Absence**

You configure the **Absence Calendar** with the *Absence Calendar* business process security policy. The business process security policy works with these business processes for time off and leaves, which manage the action steps for time off and leave requests:

- *Correct Time Off*
- *Request Leave of Absence*
- *Request Time Off*

The related actions access the **Absence Calendar**, and workers select from a combined list of time off and absence types, collectively known as absence types. Report field labels also use the term Absence.

Related Information
Tasks

Steps: Set Up the Absence Calendar on page 2080

Steps: Set Up the Team Absence Calendar on page 2074

Configure Absence Type Groups on page 2078

Reference

The Next Level: Absence Minded - A Better Way to Manage Absences

Concept: Team Absence

Note:

In September 2025, we plan to retire the legacy **Time Off and Leave Calendar**. Workday recommends that you use the more flexible **Team Absence Calendar** report, which enables you to edit time off requests as part of the new experience. See Steps: Set Up the Team Absence Calendar on page 2074.

Team absence enables managers and workers to view the time off and leave requests of their teams and extended organization. Managers can view the **Team Absence Calendar** report to analyze absence requests so that they can better manage team resources. Workers can click **View Teams** on these calendars to see the absence requests of their teammates that might impact their own request:

Calendar	Visible Absence Type
Request Time Off	Time Off
Correct My Time Off	Time Off
Request Absence	Time Off and Leave
Correct My Absence	Time Off and Leave

Workers can only view approved current or future-dated absence requests (not past). Managers can view all events and statuses.

You specify which time off and leave types employees can access by selecting **Visible for Team Absence** for each type on the **Configure Team Absence** task.

Access Groups

Workday uses access groups to provide visibility to team absence views. An access group consists of:

- Assignable roles or job profiles.
- Organization types.
- Subordinate organization access.
- Leader role access.

You create the access groups on these tabs of the **Configure Team Absence** task:

- **Manager Self Service**: Managers in these access groups can view members of the selected organization types if they have a selected *assigned role*.
- **Employee Self Service**: Workers in these access groups can view members of the selected organization types if they have a selected *job profile*.

For all access groups, you can select whether to include access to:

- Subordinate organization members.
- Workers with Is Leader roles.

Visibility

Workday lets you select the type of absence requests that you want to be visible to managers and workers. Example: For privacy purposes, your organization considers Family Medical Leave (FMLA) to be a sensitive leave type. On the **Leave Type Visibility** tab, you clear the **Visible for Team Absence** check box beside an FMLA leave type to hide requests for this type from the access groups on the **Manager Self Service** and **Employee Self Service** tabs.

Note: The security policies for these business processes take precedence over the values that you configure on the **Configure Team Absence** task:

- *Correct Request Time Off*
- *Request Time Off*
- *Request Leave of Absence*

In the **Who Can Do Actions on Entire Business Process** section of these business process security policies, users in the **Security Groups** field for the **View All** action can see events on the **Team Absence Calendar** calendar.

Managers and absence administrators can use **Team Absence Calendar**. For this calendar, the visibility settings on the **Configure Team Absence** task and the **View All** action on the security policies both apply, regardless of whether you configure the legacy *Absence Calendar* business process.

Related Information
Concepts

Concept: Absence Calendar on page 2082

Tasks

Set Up Assignable Roles

Time Off

Set Up Time Off

Setup Considerations: Time Off Plans

You can use this topic to help make decisions when planning your configuration and use of time off plans. It explains:

- Why to set them up.

- How they fit into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What They Are

A time off plan defines rules for entering and tracking 1 or more related time offs. When you set up time off plans, workers and managers can enter time off requests, correct requests, and track the status of requests through self-service pages and reports. Administrators can track, adjust, and manage accrual, time off, and time off plan balances.

Business Benefits

- Provides flexibility in creating a variety of time offs that suit the specific requirements of your organization.
- Minimize risks as you define optional or required default validation rules for taking time off.
- Lower operational costs by tracking time off balances and accruals.
- Easily enter and view time off requests in Workday Time Tracking.
- Integrate with Payroll to process payments to workers.
- Integrate with Workday Scheduling to determine working days for workers.

Use Cases

- Workers can track the approval process of a week-long vacation request.
- Managers or absence partners can approve pending time off requests.
- Absence Administrators can adjust accruals when workers change or lose their accrual eligibility due to a change in employment status.
- Absence Administrators can view time off patterns using reports for workers' absence from work on certain days of the week.

Questions to Consider

Questions	Considerations
Do you want to coordinate time off with leave of absence?	You can configure Workday to calculate combined balances for multiple leave types and time offs. You can also report on combined balances. You can suspend a worker's time off accrual when they are on leave. Alternatively, you can prorate the accrual for the period in which the worker is on leave. When you link related leave types and time offs to a source leave type, these conditions apply: • Leave types and time offs must use the same unit of time. • The multiple-jobs functionality lets you link leave types and time offs, even if they have different position-based settings. • You can associate a time off type with one leave type only.

Questions	Considerations
	• Time off requests are subject to the eligibility and validation rules for the leave type and time off.
Do you want to create position-based or worker-based time off plans?	You can create a position-based plan if you want to define and apply eligibility rules, time off validations, and accrual calculations to the worker's primary position or all positions. With position-based plans, Workday applies balances and limits to the position. You can't transfer time off balances from one plan to another when you use position-based plans. You can create worker-based plans if you want to define and apply eligibility rules, time off validations, and accrual calculations to the worker's primary position. You can create a worker-based time off plan, with a time off that requires a position. With worker-based plans, Workday applies balances and limits to the worker. Worker-based plans enable you to transfer time off balances from one plan to another.
How do you want to handle time off and accrual balances?	You can create time off plans that track balances to: • Define accruals, including frequencies and limits. • Set time off limits. • Adjust time offs. • Adjust or override accrual calculations. • Calculate and store balances. • Override time off plan balances. • Track paid time separately from unpaid time. • Pass time off to Workday Payroll Interface for use in calculations. You can create plans that don't track balances to define eligibility rules and specify unit of time for taking time off. You can't pass time off to Workday Payroll Interface for use in calculations. You can create accrue-as-you-go plans if you want workers to accrue in response to time off requests rather than in weekly or monthly increments. You can connect time offs to payroll earnings.
How do you plan to handle your time off plan policy changes?	You can use effective dating to configure your existing and new time off plans, time offs, and accruals to take effect on a certain date. If the changes align with your period schedule, you can set the effective date to the period start date or period end date.
How would you like to handle a worker's time off plan balance when a worker's eligibility for the plan changes?	You can assign a default time off plan for balance transfer and payout adjustments. You can only transfer time off balances for worker-based (not

Questions	Considerations
	position-based) time off plans, so if you want to transfer balances from one plan to another, use worker-based time off plans.
How do you want to align your time off plan policy with your payroll period frequency?	You can align time off plan period schedules with payroll period schedules of either: • Weekly. • Biweekly. • Semimonthly. • Monthly.
How do you want to handle time off requests when workers exhaust their time off balance?	You can create an absence table with a tier for each time off plan. The request automatically moves to the next tier with available balance when it exhausts the balance of the current tier.
How do you want to handle time off requests when workers are scheduled to work?	If you also use Workday Scheduling, you can configure time off plans to use scheduling shifts to determine working days for workers. This integrated experience between Absence and Scheduling: • Frees your frontline managers from double-checking workers' shifts against the dates of their time off requests before approval. • Helps workers avoid using their time off balance unnecessarily for days they're not scheduled to work. • Reduces sent back or denied requests by giving workers information up front to correct their requests and align with published shifts. Workday enables you to guide workers to only request time off on working days from a published schedule. When they don't have a published schedule, or aren't part of a scheduling organization, Absence validates their requests using the days-to-include settings on the time off plan. You can configure time off plans so that Workday: • Restricts requests for time off to days that workers are scheduled to work. • Prevents requests for planned time off when workers are scheduled to work. When working days and time off entries change, this can impact absence occurrences and absence table tier splitting. When Workday Scheduling publishes shifts for workers, Workday automatically flags absence occurrences for recalculation if there are changes to working days for workers.

Recommendations

Note:

In September 2025, we plan to retire these legacy reports and tasks:

- **Absence Calendar**
- **Place Worker on Leave**
- **Request Leave of Absence**
- **Time Off and Leave Calendar**
- **Time Off Calendar**

To aid in your transition to Absence Calendar Experience on desktop and mobile, Workday recommends that you familiarize yourself and groups of users by configuring the initiating actions for the experience instead. See Steps: Set Up the Absence Calendar Experience on page 2072.

To avoid confusion, hide balances on:

- Accrue-as-you-go time off plans, when the balance is zero.
- Time off plans that don't have accruals.

To improve tenant performance:

- Configure the country or region in all your time off plans. This also simplifies your eligibility logic.
- For time offs and accruals in a plan that share the same eligibility rules, accrual limits, and limits for paid time off, define the rules for the time off plan only. Time offs and accruals inherit the rules from the plan.
- Prevent workers from entering time off requests before going live in Workday or before a specific date. You can either define an eligibility rule on the time off, or a conditional rule on *Request Time Off* and *Correct Time Off* business processes.
- Schedule processes to store time off balances on a regular basis.
- Configure period schedules for about 2 years before and beyond going live on Workday.
- Set the lowest frequency for a period schedule to *Weekly*. Don't use *Daily* period schedules on time off plans.
- Override carryover balances for periods that fall before the go-live date, to avoid accruals in Workday before that date.
- Don't add surplus work schedule calendars. It reduces the time Workday takes to identify workers' calendars based on eligibility rules.
- For workers with unconventional work schedules, create and manually assign individual work schedules.
- Configure the holiday calendar before the current year begins.
- Don't set **Accrual - Adjustments / Overrides Allowed** for accrue-as-you-go plans.

To increase efficiency:

- Configure priorities on your time offs and accruals in the order you want workers to take time off. This configuration removes the need to correct requests if workers enter a request before they accrue the amount requested.
- Create a balance period based on the period end date for the time off plan to be available in Absence and Payroll.
- If you plan to apply rollback logic to accruals, create an absence table with multiple plans in sequential order.
- Configure your lower limit calculation to enable workers who accrue their time off at the end of the month to use their time off before accrual. Workers can request time off without accruing the requisite units.
- And to reduce administrative burden, Workday recommends that workers accrue sufficient time off before they submit their request.
- And to avoid accrual issues if you rehire a worker, for time off plans that track balances, create a separate termination time off to pay worker's balance upon termination. To reduce administrative errors, assign an eligibility rule to the termination time off such that it's visible only after the worker's termination takes effect.

Requirements

- All accruals, time offs, and other calculation values associated with a time off plan must use the same unit of time.
- When you assign priorities to time offs and accruals of a time off plan, enter unique values.
- Specify a balance period, period schedule, time offs, and accruals on a time off plan that tracks balances.

Limitations

After you save a time off plan, you can't edit these fields:

- **Period Schedule**
- **Track Balance**
- **Unit of Time**

Tenant Setup

You can persist absence data for payslips following pay complete on the **Edit Tenant Setup - Payroll** task. This option improves payslip generation performance.

Security

Configure these security domains in the Time Off and Leave functional area:

Domains	Considerations
Assistant	Users can request time off and view balances on Workday Assistant.
Self Service: Worklets: Time Off and Leave	Users can request time off and view balances on these worklets: • **Time Off** • **Time Off and Leave**
Set Up: Time Off	Users can configure the *Request Time Off* and *Correct Time Off* business processes.
Set Up: Time Off (Calculations - Absence Specific)	Users can: • View, edit, and create time off plans, time offs, time off validations. • Create time off plans that don't track balances. • Evaluate absence eligibility. • Evaluate absence calculations. • View, edit, and create absence tables.
Set Up: Time Off (Calculations - Absence Specific) *Worker Data: Time Off (Time Off Balances)*	Users can create time off plans that track balances.
Set Up: Time Off (General)	Users can create time off types. They can also control access to the time off types by creating rules.

Business Processes

Business Processes	**Considerations**
Absence Calendar (Legacy)	Enables secured workers to enter and request time off and leave of absence using the legacy Absence Calendar.
Correct Time Off	Enables managers to correct an approved time off request on behalf of a worker.
Job Change	When a worker's eligibility for a time off plan changes, this business process enables you to: • Transfer balances from previous to new time off plans. • Update time off requests against previous plans. • Adjust accruals.
Request Time Off	Enables secured roles to advance pending time off requests when the approver isn't available. When workers use this business process, Workday displays their time off requests on the time entry calendar.
Termination	Enables users to adjust time off balances for terminated workers.

Reporting

Reports	**Considerations**
Absence Configuration Snapshots	You can use this report to compare configurations across snapshots for a setup object such as an accrual, time off, or time off plan.
Accrual and Time Off Adjustments/Overrides by Batch ID	You can use this report to view time off and accrual adjustments for time off events using batch IDs.
All Balance Periods **View Balance Period**	You can use these reports to view balance periods and their: • Start and end date calculation rules. • Period date indicator, which determines the plan year for processing time off entries and accruals, when an absence processing period crosses plan year boundaries.
All Accruals **View Accrual** **View Accrual Snapshot**	You can use these reports to view accruals and: • Their related time-off plan, unit of time, and limit amounts. • Their eligibility, scheduling, and calculation rules. • Whether they allow adjustments or overrides. • Whether the accrual is configured for Buy Time Off.

Reports	Considerations
All Time Off Plans **View Time Off Plan** **View Time Off Plan Snapshot**	You can use these reports to verify the configuration of time off plans as of the effective date, including: • Their balance periods, carryover limits, period schedules, and units of time. • Whether to process accruals as of the beginning or end of the period. • Which accruals add to the balance and time offs that reduce the balance.
Evaluate Absence Calculation	You can use this report to verify configuration of accrual calculations.
Evaluate Absence Eligibility	You can use this report to verify the configuration of calculations and test whether a worker is eligible for a time off plan, time off, or accrual.
Tenant Analyzer	You can use this report to identify time off plans, time offs, and accruals that don't meet Workday recommendations.
Time Off Liability	You can use this report to calculate total time off liability for each worker and time off plans.
Time Off Plan Override Balances by Batch ID	You can use this report to view overrides to time off plan balances using batch IDs.
My Time Off Results by Period **Time Off Results by Period** **Time Off Results by Period for Workers**	You can use this report to track accruals and time offs of a worker in a balance period.

Integrations

The EIB based on the *Get Absence Inputs* web service enables you to extract multiple time off plan overrides from Workday.

You can use the *Put Absence Input* operation to override time off plan balances.

Connections and Touchpoints

Features	Considerations
Payroll	You can link time off plans and payroll earning codes to the same period schedule to align balance periods with payroll periods.
Time Tracking	You can share time off plan period schedules with Time Tracking.
Workday Assistant	Workers can view their existing balance and request time off.
Workday Scheduling	You can configure time off plans to use scheduling shifts to determine working days for workers.

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information

Concepts

Concept: Effective Dating for Absence on page 2145

Concept: Entering Time Off in Absence and Time Tracking on page 2140

Concept: Time Tracking and Absence Management on page 2607

Tasks

Create Holiday Calendars

Create Work Schedule Calendars

Manually Adjust or Override a Worker's Accrual on page 2292

Manually Schedule Storage of Time Off Balances on page 2312

Steps: Enable Managers to Create and Assign Custom Work Schedules

Steps: Set Up Absence Third-Party Calendar Integration

Steps: Set Up People Experience

Steps: Set Up Knowledge Management on page 2779

Reference

The Next Level: Overview of Absence Management, Including Employee and Manager Self Service

The Next Level: PATT Touchpoints and Reporting

The Next Level: PATT Touchpoints with Assignments

Reference: Feature Availability and Balance Tracking on page 2191

Reference: Tenant Analyzer on page 2062

Reference: Data Sections for Payroll Effective Change Interface

The Next Level: Overview of Primary Position Designation Impact

The Next Level: Day in the Life: Absence Administrator

2023R1 What's New Post: Smart Summaries

2025R1 Feature Release Note: Connected Experience: Scheduled Days to Include

Setup Considerations: Time Off

You can use this topic to help make decisions when planning your configuration and use of time off. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Time Off Segmented Setup
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Workday time off functionality enables:

- Workers to record when they’re taking time away from work.
- Administrators to manage the impacts a time off can have on other areas of Workday and other third-party applications. Example: Workday Payroll.

Business Benefits

- Improve efficiency in your organization as managers can predict trends, and plan resources accordingly.

- Integrate with a Payroll solution to enable you to process payments for workers on time off.
- Provides flexibility in creating time offs that suit the specific requirements of your organization. This functionality improves the user experience as they can quickly find the correct time off for their request.
- Workday provides reports that enable you to track costs. You can easily view how much absenteeism is costing your organization and calculate your liability.

Use Cases

- Enable workers to view and request some time off types, but not others.
- Enable workers to request time off on behalf of another. Managers can also correct time off requests.
- Import large volumes of time off events into Workday.
- Enable workers to enter time off requests through different actions in calendars in Absence Management, Time Tracking, or both.

Questions to Consider

When deciding if you should create a time off or leave of absence, consider:

Question	Consideration
When do you expect your workers to return to work?	You can create: • A time off for absences that have a short duration with a known return to work date. Workday creates a time off request for each day a worker expects to be off work. Example: Use annual leave for a vacation with a planned return date. • A leave of absence for longer durations, or for time away from work with an estimated end date. Example: Use parental leave for new parents.
How do you want a worker's status to display?	You can create: • A time off if you want a worker's status to remain unchanged. • A leave of absence if you want a worker's status to display as *On Leave*. You can configure if this status displays on each leave type. Example: You can configure Workday to hide workers on leave from search.
How do you want to restrict a worker's absence balance?	You can create: • A time off if you want workers to accrue their balance over time. Example: Paid sick leave can accrue over a period to enable workers to take up to 10 days per year. • A leave of absence if no accrual is necessary. Leave Types have an entitlement that each eligible worker can use. Example: You grant parental leave based on a worker's eligibility and company requirements.
How do you want your workers to return to work?	You can create:

Question	Consideration
	• A time off if you want a worker to return to work without their manager approving it. • A leave of absence if managers must ensure that the leave of absence ends before workers can return to work. A worker's status displays as *On Leave* until their manager returns them to work.
What periods do you use when tracking absences?	You can create: • A time off if you want workers to accrue their balance within a specified period. The period schedule used for Time Off aligns with the schedule you use for Payroll. • A leave of absence if the balance period is rolling backwards or forwards from the effective date of the leave, or first date of the leave.

When setting up time offs, consider:

Question	Consideration
How do you want your workers to view their available time offs?	You can configure Workday to display available time offs and time off balances on the calendar, or when entering a request. The balance displays as of the date of the request, so your workers can view their accrual on that date. Workers can also change the date to include in future accruals and time off requests. Example: Workers can view their remaining balance as of the end of the calendar year. Workers can also see their balances as of today when first accessing absence worklets or calendars.
How do you want workers to enter their time off requests?	When deciding how you want workers to enter a particular time off, consider who must approve it and whether workers should request it ahead of time. You can specify whether workers can enter requests for time off through: • Time Tracking: If you want managers to approve time off and worked time in the same event, use Time Tracking. • Absence: Workers can enter planned sick and vacation time through absence. • Both: You can also enable time off requests through both Absence and Time Tracking. You can configure Workday Assistant to enable workers to enter time off requests, or view their existing balance using Workday Assistant.
How do you want to pay workers on time off?	You can configure payroll to create earnings based on paid, unpaid, or total time off.

Question	**Consideration**
Who do you want to enter time off?	You can configure security groups to enable groups of workers to enter time off requests for others. You can also enable individual workers. Example: You can enable an assistant to enter time off requests for a CEO, or managers to enter time off requests for contractors. You can also only display available time offs to your managers. You can create time off segments and use them in segment-based security groups to provide access to specific time offs for different groups of users.
How do you want to manage unused time offs for terminated workers?	You can configure the *Termination* business process to either forfeit or pay out unused time offs.
When do you want to process payment to your workers on time off?	You can pay workers for approved time offs: • Up to the start of the current period. • Up to and including the current period.
What information do you want workers to enter when requesting time off?	You can require workers to select additional reasons when they're requesting time off. You can then use reports to view how often your workers select this reason. You can also require workers to enter start and end times for their time off request.
How do you want to update time off requests?	You can configure these options to update a time off request before the manager approves it: • Send the request back to the initiator with a comment asking the worker to make the revision. • Deny the request and add a comment asking the worker to enter a new request with the correct information. • Approve, then correct the request. • Cancel the request and enter a new request on the worker's behalf. • Review projected time off balances for the worker and see pending requests awaiting approval. • View any adjustments made. You can also configure the Workday mobile app to enable workers to correct time off requests with or without start and end times.
How do you want to prevent your workers from entering an invalid time off request?	You can: • Define validation rules to prevent workers from entering invalid requests. You can also configure a validation message that displays to workers when they attempt to enter the request. Example: You can create a rule that prevents

Question	Consideration
	multiple entries for the same time off on the same day. • Configure the days for which workers can request time off. Example: Enable workers to enter time off for scheduled work days. • Display time off only on your managers self-service interface.
When do you want your workers to accrue time off?	You can set your accruals: • Period by period. Example: Workers accrue 2 days per month. • Front-loaded. Workers accrue their full balance at the start of the balance period. • Custom frequency. Assign accruals when a worker completes their probationary period or for a specific anniversary date.
How do you want your workers to carryover their time off balance?	You can define carryover rules to enable your workers to carryover time off balance from 1 balance period to the next. Carryover rules also enable you to configure: • How many units to carryover. • When the carryover expires.
For which days do you want your workers to enter time off requests?	You define specific days in which your workers can request time off. You can also specify if a time off is available on a public holiday. Example: One of your international offices doesn't have Monday to Friday as the standard working week. You can define Sunday to Thursday as the working week. Workers in that location can request time off on Saturdays.

Recommendations

Note:

In September 2025, we plan to retire these legacy reports and tasks:

- **Absence Calendar**
- **Place Worker on Leave**
- **Request Leave of Absence**
- **Time Off and Leave Calendar**
- **Time Off Calendar**

To aid in your transition to Absence Calendar Experience on desktop and mobile, Workday recommends that you familiarize yourself and groups of users by configuring the initiating actions for the experience instead. See Steps: Set Up the Absence Calendar Experience on page 2072.

When you opt in to Segmented Security for Time Off, we recommend that:

- You either secure all absence table tier time offs or none of the tier time offs to each time off segment. If you secure some but not all tier time offs to a segment, users have access to all of the tier time offs on that absence table.

- After you create new time offs, you must add them to the appropriate time off security segment to enable users to access them in a time off request or correction. We recommend performing this step after you add the new time offs to a time off plan.

To improve performance when workers are entering time off requests, or when you run reports:

- Store calculated time off balances on a regular basis.
- Hide balances on your calendars and worklets in your tenant.
- Populate the country or region in all your time off plans.
- Configure your period schedules 2 years into the future and don't use daily period schedules.

When you define validation rules to prevent users from entering invalid requests:

- To ensure accurate calculations, use the same time units in validation rules and time off plans.
- Avoid conflicting rules.
- Apply maximum and multiple request rules consistently.
- Prevent multiple entries for the same time off on the same day.
- Avoid overly complex calculations.
- Limit calculations that reference calculated fields.

For terminations:

- Create a separate time off to pay out or forfeit a worker's time off balance.
- Create an eligibility rule so that workers are eligible for the termination time off in the relevant period.

To increase efficiency, configure priorities on your time offs and accruals in the order you want workers to take time off. This configuration removes the need to correct requests if workers enter a request before they accrue the amount requested.

Ensure that the *Request Time Off* and *Correct Time Off* business processes have the same configuration.

Requirements

If you use the same time off type with more than one time off:

- Select only time offs that are associated with time off plans that use the same unit of time (hours or days).
- Ensure that workers are eligible for only 1 time off at a time. Otherwise, they're able to request more than one time off with the same name and potentially reduce the time off plan balance twice.

If you apply maximum or multiple request rules to a validation set, each time off must have the same limits and include the same time offs. Otherwise, the same combination of time off requests that is valid in 1 situation might not be valid in another.

Limitations

- The sequence in which time offs process, combined with a lower time off limit, can affect the number of units treated as paid or unpaid time off for a worker. Example: Jane accrues 14 total hours per month (10 vacation + 4 sick hours). She previously requested 8 hours of vacation time off, leaving her with 6 available hours. She enters a request for 8 hours sick time off, which Workday rejects.
- You can only use time off plans that track balances with Workday Payroll.
- Workday doesn’t support start and end times when entering time off using absence tables.

Tenant Setup

Select the **Edit Time Off Type** option to enable workers to change the time off type when they correct an approved time off request.

Security

Domain	Considerations
Process: Enter or Correct Time	Users with access to this domain can enter or correct time off for any worker.
Self-Service: Time Off	Users with access to this domain can access the **Time Off and Leave** worklet to enter time off requests.
Set Up: Time Off (General)	Users with access to this domain can create time off types. They can also control access to the time off types by creating rules.
Set Up: Time Off (Calculations - Absence Specific)	Users with access to this domain can: • Create a time off definition for each time off workers can request. • Specify the time off type, enable adjustments, and configure validation rules. • Define requirements if a time off has eligibility requirements or limits that differ from the time off plan. • Define rules to warn users of invalid time off requests or prevent workers from entering them. • View absence eligibility details for active workers within selected organizations.
Access Time Off (Segmented)	Users who are members of segment-based security groups with access to this domain can request or correct time off for time off types in the time off segment secured to their security group. If users have access to time offs for their own self-service needs, and those same users hold a support role for their organization, they can see all of the time offs in both time off segments. Example: Absence partners support the organizations that they belong to.
Worker Data: Time Off (Adjustments and Overrides)	Users with access to this domain can adjust a worker's time off.
Worker Data: Time Off (Time Off Manager View)	Users with access to this domain can view all time off requests on their absence calendars.

Business Processes

Business Process	Considerations
Absence Calendar (Legacy)	You can add an initiating action to this business process to enable secured workers to use their absence calendar to enter time off requests for another worker.
Correct Time Off	You can add steps to this business process to enable users to correct a worker's approved time off. You can also define a conditional rule to

Business Process	Considerations
	prevent workers from entering time off requests on accrue-as-you-go plans before an effective date.
Change Job	Add the *Update Time Off Requests* action step to this business process after the completion step. This transfers time off events when a worker changes roles.
Request Time Off	You can also add steps to this business process to: • Configure who approves time off requests. • Enable users to bulk load time off events.
Termination	Add automated leave processing after the completion step to enable you to terminate workers while they're on leave.

Reporting

Reports or Dashboards	Consideration
Absence Calendar (Legacy)	Managers can use this report to view submitted and approved requests for their direct reports 1 week at a time. If a worker has multiple positions, the manager sees requests for all positions. You can: • Add a link to the calendar from the **Team Time Off** worklet using the **Configure worklet** task. • Control whether the calendar displays time offs, leaves, or both.
All Time Blocks and Time Off Entries **All Worker Time Off** **Approved Time Off** **My Team's Upcoming Time Off** **Time Off - All Statuses for Active and Terminated Employees (Indexed)**	Use these reports, report data sources, and dashboards to display all time offs for workers in organizations that you manage or support. The information enables you to allocate resources and plan for future time offs.
All Time Offs	Use this report to view all time offs and: • Their related time off plan, time off type, unit of time. • Their eligibility and scheduling rules. • Whether they allow adjustments or overrides, negative time off limits, and data entry validations for time off requests.
All Time Off Security Segments	Use this report to view the time off security segments in your tenant and their associated time offs and security groups.
Correct My Time Off (Legacy) **Correct Time Off** (Legacy) **Enter Time Off** (Legacy)	These legacy reports are available from the **Time Off** worklet, or related actions (from the worker). However, with the Absence Calendar Experience,

Reports or Dashboards	Consideration
Request Time Off (Legacy)	Workday enables you to easily request and manage time off using the: • **Manage Absence** report. • **Request Absence** task.
Manage Absence	Use this report to manage your own time off or view another worker's absence calendar, review and edit their absence, or request absence on their behalf.
Mass Operation Management - Correct Time Off **Mass Operation Management - Request Time Off**	Use these reports to enable members of segment-based security groups to perform mass operations on time off business processes.
Time Off Approvers with Events Awaiting Action	Use this report to identify approvers who have unapproved time off events awaiting their action.
Time Off for Payroll Interface	Use this report to view approved time off requests for 1 or more organizations within a specified period of time to find out what time off you haven't yet paid.
Time Off Liability	Use this report to view the liability of an organization for time off balances. For the time off plans and date you select, Workday reports the plan balance and total liability for each worker. For workers paid in a different currency, Workday displays the liability in the currency paid.
Time Off Liability for Position	Use this report to view your liability for time off plan balances for employees' positions in the supervisory organizations you select.
My Time Off Results by Period **Time Off Results by Period** **Time Off Results by Period for Workers** **Time Off Results Summary**	Use these reports to view accruals, paid, and unpaid time off for each period. You can also view time offs to pay out when a worker is terminated.
Time Off Types	Use this report to view all the time off types that users can select in prompts when they enter or review time off requests. You can associate a time off type with multiple time offs.
View Time Off **View Time Off Balance** **View Time Off Results by Period**	You can access these reports from the related actions menu of a worker to view their time off details.
View Time Off Data Validation Custom Text	Use this report to view specific custom text messages for time off validations in your tenant and their usage.
View Worker Time Off Eligibility by Organization	Use this report to view time off eligibility details for active workers within the selected organizations as of the current day.

Integrations

Web Services	Consideration
Adjust Time Off	Use this web service to adjust or correct an existing time off entry.
Enter Time Off	Use this web service to enter a time off request.
Import Time Off Request Event Batch	Use this web service to bulk upload a high volume of time off requests into Workday.

Connections and Touchpoints

Touchpoint	Consideration
Workday Assistant	Workers can request time off, view their time off balance, and view holiday schedules using Workday Assistant. Workday Assistant doesn't support these features and configurations: • Attachments. • Business process comments. • Time offs configured with **Start Time** and **End Time**. • Time offs that workers can only enter through Time Tracking.
Guided Tours	Provide help text that supports a business case for your organization for the selected field. Example: If your company limits the number of hours a worker can request off per day, the guided tour on the **Request Time Off** task might have this help text for the **Daily Quantity** field: Enter a value between 4 and 8 hours.
Payroll	You can configure Workday Payroll to create earnings based on a paid, unpaid, or total time off for a worker.
Third-Party Payroll	You can configure the Payroll Effective Change Interface (PECI) integration to include grouped time off entries in the **Time Off Earnings and Deductions** data section of the **Data Changes Audit** report. Groupings can span pay periods. Workday groups time off in date ranges and produces separate groupings for: • Full and partial-day absences. • Different time off types.
Time Tracking	Workers can enter and submit time through Workday Time Tracking while they're on leave. You can also create a time validation to prevent submission.

Touchpoint	Consideration
	You can also configure Time Tracking to display absence balances on time entry templates.

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information

Concepts

Concept: Eligibility for Time Off Plans, Time Off, and Accruals on page 2142

Concept: Entering Time Off in Absence and Time Tracking on page 2140

Setup Considerations: Time Off Plans on page 2084

Tasks

Steps: Create a Time Off on page 2104

Create Time Off Types on page 2121

Create Time Off Validations on page 2122

Steps: Set Up Absence Third-Party Calendar Integration

Reference

Effective Dating for Service Dates

Steps: Set Up Time Off Plans

Prerequisites

- Enable multiple job functionalities on your Workday tenant.
- Security: *Set Up: Time Off* domain in Time Off and Leave functional area.

Context

Time off plans enable workers to request time off and their managers to approve the requests. You can also use time off plans to set up accruals, time off taken, and balances. Enter basic information for a time off plan first, and then associate the components as you create them.

Steps

1. Create Custom Business Processes.

   Configure the *Request Time Off* and *Correct Time Off* business processes to route time off requests and adjustments to the appropriate roles for review and approval.

   You can configure the *Request Time Off* business process security policy so that secured roles can advance pending time off requests when the approver isn't available.
2. Configure time offs.
   a. Create Time Off Types on page 2121.
   b. Create a time off.

      See Steps: Create a Time Off on page 2104.
   c. (Optional) Create Time Off Validations on page 2122.
3. Track accrual, time off, and time off plan balances:

   a) Create Period Schedules for Time Off on page 2160.

   b) Create Balance Periods on page 2161.

   c) Create Accruals on page 2162.

   Note: All time offs, accruals, and other calculation values associated with a time off plan must use the same unit of time.

4. Create time off plans that track or don't track balances.

   See:

   - Create Time Off Plans That Don't Track Balances on page 2135.
   - Create Time Off Plans That Track Balances on page 2126.
5. Create Absence Tables on page 2261.
6. Manually Schedule Storage of Time Off Balances on page 2312.
7. (Optional) Configure the **Time and Absence Dashboard**.

   See Concept: Dashboards for Time Tracking and Absence on page 2675.
8. (Optional) Access the **Maintain Time Off Plan Balance Display Priority for Search** task.

   Enter priorities for time off plan balances that you want to display in the **Your Time Off Summary** card. Workday delivers these personalized results as part of the Smart Summaries feature. This card provides eligible workers:

   - Their time off balance, if you enter a priority.
   - Their upcoming time off within the next 30 days, regardless of the priorities that you enter.
   - A link to request time off and view all time off balances, if you enter a priority.

   When workers search for time off or other related terms, Workday displays the balance for the highest priority time off plan. Plans with a lower number have a higher priority.

   When entering priority values for your organization, consider what the highest priority time off plan balances might be for all users. Your users might have different eligibility based on country or location. Allocate priority based on your own country-specific configuration and decide on a convention.

   Entering a priority of 1 for at least 1 time off plan ensures that Workday displays a balance in the **Your Time Off Summary** card when eligible workers search for time off or other related terms.

Priorities for Displaying Time Off Plan Balances in a Global Organization

Time Off Plan	Priority
FranceTimeOffPlan1 (Vacation)	*101*
FranceTimeOffPlan2 (Sick)	*102*
FranceTimeOffPlan3 (Jury Duty)	*103*
UKTimeOffPlan1 (Sickness)	*201*
UKTimeOffPlan2 (Vacation)	*202*
IrelandTimeOffPlan1 (Annual Leave)	*301*
IrelandTimeOffPlan2 (Sickness)	*302*
IrelandTimeOffPlan3 (Paternity Leave)	*303*

Next Steps

If you're using Workday Payroll to process worker payments, create pay components to calculate paid and unpaid time off.

Related Information
Concepts

Concept: Relationship of Time Off Plan Components on page 2139

Concept: Effective Dating for Absence on page 2145

Concept: Business Process Management

Concept: Time Off Earnings

Tasks

Steps: Set Up People Experience

Steps: Set Up Knowledge Management on page 2779

Reference

Reference: Feature Availability and Balance Tracking on page 2191

The Next Level: Overview of Absence Management, Including Employee and Manager Self Service

The Next Level: Absence Configuration

The Next Level: The Calculation Engine Behind Absence Management

2023R1 What's New Post: Smart Summaries

Examples

Example: Create an Earning for a Single Time Off

Steps: Create a Time Off

Prerequisites

- Create Time Off Types on page 2121.
- Review the setup considerations for time offs.
- Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area.

Context

You can:

- Create definitions for each time off workers can request.
- Specify the time off type, enable adjustments, and configure validation rules.
- Define requirements when a time off has eligibility requirements or limits that differ from the time off plan.

When a time off is part of a position-based time off plan, limits are based on position. You can define eligibility rules and validations that reference a worker's primary position or all positions.

Steps

1. Access the **Create Time Off** task.

   As you complete the task, consider:

Option	Description
Code	Enter a time off code for web services and EIB uploads.
Comments	Enter a high-level summary on the time off to explain what to use it for and any calculations you had to create.
Time Calculation Tag	(Optional) Select time calculation tags to assign to time off units. Workday Time Tracking uses time calculation tags to identify time off units in time calculations and totals. Example: Display time off totals to workers when they enter time.
Require Position on Time Off Request	(Optional) When selected, Workday:

Option	Description
	• Requires workers on a worker-based plan to enter a position that they want to request time off against. • Uses the approval step on the *Request Time Off* business process to route the request to the specified security group for approval. Example: If **Group** is set to *Manager*, Workday routes the request to all managers. However, the position in the request helps managers identify who should take action. If you specify a **Routing Modifier** on the approval step, when workers have 2 positions, Workday can route the request to either the primary manager or non-primary managers. By adding a condition rule that evaluates whether the request includes time off entries for the primary position or additional positions, you can route requests to the relevant managers based on which positions are included in the request. If there are multiple non-primary managers, Workday routes the approval to all additional managers. See Set Up Multiple Position Routing. • Automatically pays the worker's pay rate on the payslip. Workers can use **View Time Off** to review their selections.
Time Off Type	If you use the same time off type with more than 1 time off, ensure that workers are eligible for only 1 time off at a time. This prevents workers from requesting more than 1 time off with the same name and reducing their time off plan balance twice.
Picked up by Payroll Interface one Period in Arrears	(Optional) Select to include time off from the prior processing period and time off taken before the prior period start date but approved after the last payroll interface run. (Optional) Clear to include time off from the current period and time off taken in prior periods but approved after the last payroll interface run.
Priority	Assign a priority for processing the time off when multiple time offs subtract from the same time off plan. Workday processes time offs in the order from highest priority to lowest when a worker takes more than 1 time off during the same processing period. Enter a unique value as the priority for each time off. Example: Multiple time offs subtract from the same time off plan balance, and a worker requests absence against each time off object during the same processing period.

Option	Description
	The priority, combined with a lower time off limit on the time off plan, and/or limit override value on the time off, can affect paid and unpaid time off.
Hide from Worker Self Service	(Optional) Prevent workers from requesting time off through self-service pages. Alternatively, you can set up Segmented Security for Time Off to control who can access specific time offs using time off security segments and segment-based security groups. When you opt in to this feature, Workday removes this check box. Regardless of this setting, workers can always view their time off balance. Also, managers can select the time off when entering time off on behalf of workers.
Entry Option	Select an option to specify whether workers can enter requests for the time off through: • Time Tracking only. • Time Off only (using the Absence Management **Request Absence**, **Request Time Off**, **Enter Absence**, or **Enter Time Off** tasks). • Time Tracking and Time Off.
Display Start and End Time	(Optional) Displays when you select an **Entry Option** value of *Enter through Time Off Only*. Select this check box so that workers can enter values for start and end times when entering time off.
Start and End Time Required	(Optional) Displays when you select an **Entry Option** value of *Enter through Time Off Only* and **Display Start and End Time**. Select this check box to require workers to enter values for start and end times when entering time off.
Calculate Quantity Based on Start and End Time	(Optional) Select this check box to prevent workers overriding the number of hours for the daily quantity. This option ensures that: • The quantity of time that workers request per day equals the duration of time between the start time and end time. • Workday ignores the daily quantity default. Available for selection on the **Edit Time Off** task when the time off is linked to an hours-based plan, not a days-based plan. Displays when you select **Entry Option** values of either:

Option	Description
	• *Enter through Time Off Only* and **Start and End Time Required**. • *Enter through Time Tracking and Time Off*. When you select this check box, Workday: • Selects the **Display Start and End Time** and **Start and End Time Required** check boxes, if not already selected, and they're no longer optional. • Autopopulates the **Daily Quantity** value on the time off request and workers can't override the value. When you don't select this check box, workers can override the number of hours for the daily quantity when entering time off. Example: You select **Display Start Time and End Time** on the time off. A worker later requests time off and enters a **Start Time** of *8:00 AM* and an **End Time** of *5:00 PM*. Workday autopopulates the **Daily Quantity** with *9* hours, but the worker can override this value by entering *8* hours.

2. (Optional) Create Time Off Validations on page 2122.
3. (Optional) Create Time Off Plan Overrides for Time Offs on page 2295.
4. (Optional) On the **Reasons** tab, configure reasons for workers to report when requesting this time off.

   The **Reason ID** is used in web service API and EIB uploads for time off requests. Workday updates the **Count** each time a time off entry includes the reason.
5. (Optional) Set Up Mass Operations.

   When reviewers aren't available, or you want to approve multiple time off requests that are in-progress, use the Mass Operation Management task. This task advances business process requests for a selected group of workers using a custom report. Your custom report must generate a list of time off request events that need approval. Configure relevant security groups in the Manual Advance action of the Request Time Off business process and security policy in the Time Off and Leave functional area.

Next Steps

Add time offs to:

- Time off plans.
- The appropriate time off security segment to enable users to access them in a time off request or correction. We recommend performing this step after you add the time offs to a time off plan.

Related Information
Concepts

Concept: Accrual and Time Off Limits on page 2176

Concept: Time Tracking and Absence Management on page 2607

Concept: Entering Time Off in Absence and Time Tracking on page 2140

Concept: Time Off Earnings

Steps: Set Up Segmented Security for Time Off

Prerequisites

- Configure the *Correct Time Off* and *Request Time Off*, business processes and security policies in the Time Off and Leave functional area.
- Create time offs and absence tables that contain the time off types you want to secure.
- Before configuring new time off security segments or updating existing ones, check that there are no time off entries with an unsubmitted status. This status is only possible when workers enter time off in Time Tracking. If you change time off security, you might prevent those time off events from completing.

Context

You can create time off segments to provide access to specific time offs for different groups of users, including time offs that are part of an absence table. Example: You might create 3 individual segments to provide access for administrators, employees and contingent workers, and managers.

Segmented security for time off removes the need for warning and error validations that control access on time off business processes, streamlining your configurations.

Segmented security for time off is currently an opt-in feature. When you opt in to the feature, Workday:

- Disables and removes the functionality behind the **Hide from Worker Self Service** check box on all time offs in your tenant.
- Applies the segmented security configuration to determine what time offs to display to workers when they request or enter time off.

Workday displays details of the time off segments in your tenant and their associated time offs and security groups on the **All Time Off Security Segments** report.

Steps

1. Access the **Domain Security Policies for Functional Area** report.

   Review the segment-based security groups on the *Access Time Off (Segmented)* domain security policy. This domain enables you to configure access to security segments for time offs and absence tables, which control who can request or correct specific time offs.

   If not already enabled, select **Domain Security Policy** > **Enable** from the related actions menu of the security policy for the *Access Time Off (Segmented)* domain in the Time Off and Leave functional area.

   Security: The *Security Activation* and *Security Configuration* domains in the System functional area.
2. Access the **Create Time Off Security Segment** task.

   Select the time offs that you want to secure to the segment from the **Time Offs** prompt.

   For absence tables, we recommend that you either select all of the tier time offs or none of them when providing access for certain security groups. Workday reevaluates all tiers on an absence table after a manager or administrator approves a time off request, including tiers that workers can't access. When providing access to tier time offs, for:

   - Managers, select all tiers.
   - Employees, select all tiers or none.

   Security: *Set Up: Time Off* domain in the Time Off and Leave functional area.
3. Create Segment-Based Security Groups.

   Create segment-based security groups that grant specific security groups access to the new time off security segments.

4. Edit Domain Security Policies.

   Edit permissions for the *Access Time Off (Segmented)* domain in the Time Off and Leave functional area to grant the segment-based security groups access to the time offs.

   If you don't have any time offs with **Hide from Worker Self Service** check box selected, Workday adds the *All Users* security group to the *Access Time Off (Segmented)* security policy. Remove this security group, and replace it with the segment-based security groups you want to use.

   If the *Access Time Off (Segmented)* domain security policy includes security groups that aren't associated with a time off segment, Workday doesn't apply any security segment restrictions to users in the security group, even if they're also in a security group that's associated with another time off segment. Example: Your company has 3 time off types: *Annual*, *PTO*, and *Sick*. You configure these segment-based security groups and add them to the domain.

Segment-Based Security Group	Access Time Off (Segmented) Domain Access	Associated with a Segment	Time Off Type	Considerations
Group A - Administrators	Yes	No	N/A	Users can access all time off types when correcting or requesting time off. This overrides the *Group B - Employee as Self* security configuration.
Group B - Employee as Self	Yes	Yes	*Annual* and *PTO*	Users can access only the *Annual* and *PTO* time off types. They can't access the *Sick* time off type.

5. Before opting in to Segmented Security for Time off, access these reports:

Report	Consideration
All Time Offs	Check these report fields to assess the visibility and security for each time off: • **Hide from Employee Self Service** • **Time Off Security Segment**
All Time Off Security Segments	Crosscheck to ensure that all time offs are in the correct segments, secured to the correct segment-based security groups. Make sure that no time offs are missing.

6. Activate Pending Security Policy Changes.
7. If you use authentication policies to restrict access to certain domains, edit access restrictions and update your policies to include the segment-based security groups in an authentication rule.

   See Steps: Set Up Authentication Policies.
8. (Optional) When an absence partner supports their own supervisory organization, you can change the worker who has the *Absence Partner* role for that organization. This prevents absence partners seeing the time offs in time off segments secured by the *Absence Partner* role when requesting time off in an employee self-service context.

   See Change Absence Partner Role Assignments on page 2138.

9. Access the **Maintain Feature Opt-Ins** report.

   Opt in to Segmented Security for Time Off.

   Note: After you opt in, you can't opt out.

   Security: *Set Up: System* domain in the System functional area.
10. (Optional) Verify the security policy changes. For each new time off security segment:
    a) Sign in as a user who's a member of a segment-based security group associated with the new time off segment.
    b) Access 1 of these tasks:
       - **Manage Absence**
       - **Request Absence**
    c) Verify that the time offs that you secured to the relevant time off segment are available for selection for the user.
    d) Repeat steps a-c to verify access to the time off segments for each segment-based security group.

    Segmented security for time off also applies to certain options on these Time Tracking tasks:

    - **Enter My Time**
    - **Enter Time for Worker**

    When you secure a time off, only members of the segment-based security groups with access to the time off segment can edit related time off requests using these time-entry options:

    - **Enter Time by Type**
    - **Enter Time by Week**
    - **Enter Time**

    Note: When workers or managers try to use the **Enter Time** > **Enter Time** menu to add more time or time off to an existing time week that includes an absence table time off request, Workday prevents them completing the task. If your company has set up absence tables, we recommend that users request time off using another option on the **Enter Time** menu or micro-edit.

Example

Next Steps

As you create new time offs, add them to time off security segments so that users can access the time offs in time off requests or corrections.

To hide an absence table from certain users, remove all of the tier time offs from the time off segment.

Related Information
Concepts

Concept: Security Groups

Concept: Opt-In Features

Reference

FAQ: Segmented Security for Time Off on page 2154

Reference: Time Entry Options on page 2644

The Next Level: Preparing for Time Off Segmented Security (Guide)

Examples

Example: Set Up Segmented Security for Time Off on page 2218

Steps: Enable Termination Adjustments for Time Off Plans

Prerequisites

Configure the time off plan to track balances.

Context

Workday can create termination adjustments for selected time off plans to set employees' balances to zero. Workday creates these adjustments when you terminate employees using the *Termination* business process or *Terminate Employee* web service.

Workday uses time offs, accruals, and any adjustments for dates on or before the termination date to determine the amount of an adjustment. Workday doesn't process balance adjustments of greater than 1000 units.

Termination adjustments are visible to administrators but hidden from employees until the day after their termination date. Employees continue to see their unadjusted balances and can request time off as before.

Steps

1. Add the *Adjust Time Off Balances* service after the completion step of the *Termination* business process.
2. Decide which time off to adjust for a plan when you terminate an employee.

   Consider if Payroll retrieves adjustment units for the time off. If it does, are there impacts of termination adjustments on Paid Time Off, Unpaid Time Off, and Time Off Totals? Also consider how you want to report payouts, if applicable, on payslips.
3. Select the time off to use to create termination adjustments for a plan.
   a. Access the **Create Time Off Plan** task.

      Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in Time Off and Leave functional area.
   b. On the **Time Off** tab, add the time off to the plan.
   c. Select the time off as the **Time Off for Termination Adjustment**.
4. Make sure that eligibility requirements for the time off plan, its accruals, and the adjusting time off cover employees who are terminated midperiod.

   To receive a termination adjustment, an employee must meet eligibility requirements on the effective date of the termination. When eligibility rules don’t cover employees who are terminated midperiod, the adjustment amount and time off reports for these employees can be inaccurate.

Result

Workday generates a termination adjustment that's visible to administrators on the **Termination Adjustments** tab of the **Maintain Accrual and Time Off Adjustments/Overrides** task. The adjustment takes effect on the termination date.

Related Information
Concepts
Concept: Termination Adjustments on page 2255

Steps: Remove Invalid Time Off Entries After Job Changes

Prerequisites

Security: These domains:

- *Business Process Administration* and *Manage: Business Process Definitions* in the System functional area.
- *Set Up: Time Off* in the Time Off and Leave functional area.

Context

You can configure Workday to automatically remove approved time off entries after the completion of *Change Job* business process events when either the:

- Workers are no longer eligible for the approved time off.
- Entries are no longer valid days to include due to changes in holiday calendars or work schedule calendars as part of the *Change Job* event.

Invalid time off entries that remain on a worker's calendar after a job change can negatively impact reporting, scheduling, balance calculation, and integrations.

You can use the *Remove Invalid Time Off Entries After Job Change* service step to initiate the *Correct Time Off* business process and remove invalid, approved time off entries on or after the effective date of the worker's job change. This step removes the need to find and manually remove these time off entries. Workday automatically creates a *Correct Time Off* event for the approved invalid time off entries and adjusts the units down to zero.

Steps

1. Edit Business Processes.

   On the *Change Job* business process, add the *Remove Invalid Time Off Entries After Job Change* service step after either of these steps, depending on which one you use:

   - *Auto-Manage Business Processes* service.
   - *Manage Business Processes for Worker* action.

   This allows you to manage any in-progress events for a worker including time off requests or corrections. The *Remove Invalid Time Off Entries After Job Change* service step only corrects approved time off entries. In-progress time off entries require the *Auto-Manage Business Processes* or *Manage Business Processes for Worker* steps to handle business process cancellation or approval.

   You must add the *Remove Invalid Time Off Entries After Job Change* service step after the completion step (where **Complete** equals *Yes*). Workday displays an error if you try to add this step before the completion step.
2. After you add the *Remove Invalid Time Off Entries After Job Change* service step for the first time, Workday displays a warning message. Access the **Evaluate and Process Events Impacting Absence** task to run a background job immediately that initiates evaluation and correction of ineligible future time off entries and accrual adjustments. From this point onwards, Workday initiates the background job automatically every 15 minutes.

   If you don't run the **Evaluate and Process Events Impacting Absence** task, Workday continues to flag invalid time off entries that occur on or after the effective date in the *Change Job* business process event until the next Weekly Service Update when we automatically initiate the background job to run every 15 minutes in your tenant.

   Note:

   If Workday doesn't display a warning message when you add the service step to the business process definition for the first time, this means that the background job is already running and there's no need to run the **Evaluate and Process Events Impacting Absence** task.

   If *Rescind* or *Correct* actions occur on the *Change Job* business process, you might need to manually remove or re-enter time off entries that start on or after the effective date of the job change. This is because a rescind or correction of the *Change Job* event won't impact any automatic time off corrections by the **Evaluate and Process Events Impacting Absence** task.

3. Create a separate rule-based business process definition for the *Correct Time Off* business process because the *Remove Invalid Time Off Entries After Job Change* service creates correction events that follow the business process definition.

If you want the service step to automatically remove invalid time off entries without review and approval, create a business process with just a single initiation step (Step a), as follows:

a) From the related actions menu of the *Correct Time Off* business process, select **Business Process** > **Copy or Link Business Process Definition**.

b) Select *Rule Based Workflow Definition Name* and enter a name. Example: *Remove Invalid Time Off Service*. Click **OK**.

c) From the related actions menu of the *Correct Time Off (Remove Invalid Time Off Service)* business process, select **Business Process** > **Rule-Based Business Process Configuration** and click **OK**.

d) From the related actions menu of Step a, select **Business Process** > **Set as Completion** and click **OK**.

e) As a related action on the business process, select **Business Process** > **Edit Definition**.

f) Remove any additional steps and click **OK**.

4. Create Business Process Condition Rules .

Create a condition rule that uses the **Initiating Business Process of Remove Invalid Time Off Entries Service** report field to identify when the initiating business process is *Change Job*:

a) From the related actions menu of the initiation step, select **Business Process** > **Create Condition Rule** and click **OK**.

b) Enter a description. Example: A name such as *Time Off Correction Initiated by Remove Invalid Time Off Service After Change Job?* helps identify the business process condition rule.

c) Enter a comment to explain the condition. Example: *If time off correction is initiated by Remove Invalid Time Off After Job Change, then exit of a - Correct Time Off notifies Employee as Self* .

d) Add a rule with these values:

And/Or	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
And	*Initiating Business Process of Remove Invalid Time Off Entries Service*	*in the selection list*	*Value specified in this filter*	*Change Job*

Note: Other possible comparison values are:

- *Assign Work Schedule*.
- *Termination*.
- Blank, if the correction was not initiated by the service step.

5. Create Custom Notifications .

To notify employees that Workday is correcting their time off as a result of a *Change Job* event, create a custom notification on the rule-based business process definition:

a) From the related actions menu of the business process, select **Business Process** > **Add Notification** and click **OK**.

b) Complete the task:

Option	Description
Triggers	From the **On Exit** prompt, select *a - Correct Time Off*.

Option	Description
Conditions and Rules	Add a rule and select the business process condition rule that you created previously.
Groups	Select the *Employee as Self* security group.
Email Message Content	Enter the details: • **Subject:** Add a row to enter text for the subject line. Example: *Time off Correction Submitted on Your Behalf*. • **Body:** Add a row to enter body text. Example: *Workday submitted a time off correction on your behalf due to a Change Job event that resulted in invalid time off entries after eligibility changes or the dates changing to non-working days.*

6. Configure Rule-Based Business Processes.

   To ensure that Workday only sends notifications to employees for corrections initiated by the service step as part of the *Change Job* business process, create a rule that triggers the rule-based business process when True:

   a) From the related actions menu of the rule-based business process that you created previously, select **Business Process** > **Rule Based Business Process Configuration** and click **OK** .
   b) Add a rule. From the **Rule** prompt, select **Create Condition Rule**, and click **OK**.
   c) Enter a description. Example: A name such as *Time Off Correction Initiated by Remove Invalid Time Off Service* helps identify the business process condition rule.
   d) Enter a comment to explain the condition. Example: *True if the event is a time off correction that was initiated by a Remove Invalid Time Off Entries Service.*
   e) From the **Copy Condition from Rule** prompt, select the business process condition rule that you created previously. Example: *Time Off Correction Initiated by Remove Invalid Time Off Service After Change Job?*
   f) Create a rule with these values and click **OK**:

And/Or	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
And	*Initiated by Remove Invalid Time Off Entries Service*	*equal to*	*Value specified in this filter*	Select the check box.

Result

You can initiate the *Change Job* business process to verify that the *Remove Invalid Time Off Entries After Job Change* service step is working. See Reference: Change Job Initiation. On the **Manage Absence** report, if workers requested time off but have a job change that makes them ineligible for the time off, as of the effective date, Workday removes the time off entries from their calendar, or reallocates the time off to a different absence tier that they're now eligible for when sufficient balances exist.

Related Information

Concepts

Concept: Completion Steps

Tasks

Configure Rule-Based Business Processes

Reference

2025R1 Feature Release Note: Change Job Impacts on Time Off

Steps: Remove Invalid Time Off Entries After Termination

Prerequisites

Security: These domains:

- *Business Process Administration* and *Manage: Business Process Definitions* in the System functional area.
- *Set Up: Time Off* in the Time Off and Leave functional area.

Context

You can configure Workday to automatically remove invalid time off entries that result from the completion of a *Termination* business process event. Invalid time off entries that remain on a worker's calendar after termination can negatively impact reporting, balance calculation, and integrations.

The *Remove Invalid Time Off Entries After Termination* service step initiates the *Correct Time Off* business process to remove approved time off entries after the worker's **Termination Date**. Workday automatically creates a *Correct Time Off* event for the approved time off entries that occur after the **Termination Date** and adjusts the units down to zero.

Steps

1. Edit Business Processes.

   On the *Termination* business process, add the *Remove Invalid Time Off Entries After Termination* service step after the *Completion* step and after either of these steps, depending on which one you use:

   - *Auto-Manage Business Processes* service.
   - *Manage Business Processes for Worker* action.

   The *Remove Invalid Time Off Entries After Termination* service step only corrects approved time off entries. In- progress time off entries require the *Auto-Manage Business Processes* service or *Auto-Manage Business Processes* action to handle business process cancellation.

   Note: After the *Remove Invalid Time Off Entries After Termination* service step completes, the service step won't reflect any corrections or rescinds of the termination event because Workday doesn't support *Correct* or *Rescind* actions on time off business processes. We recommend that you include the *Remove Invalid Time Off Entries After Termination* service step later in your *Termination* business process definition to reduce the likelihood of it completing prior to any termination corrections or rescinds.
2. (Optional) Configure a condition rule on the *Remove Invalid Time Off Entries After Termination* service step. From the related actions of the service step on the **Business Process Steps** tab, select **Business Process** > **Create Condition Rule**.

   Example: To configure a rule that only removes time off entries after voluntary terminations, add a rule with these values:

And/Or	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
And	*Involuntary Termination*	*equal to*	*Value specified in this filter*	*No*

   See Create Business Process Condition Rules.

3. (Optional) Add a delay to a step on the *Termination* business process.

   Example: To add a delay to the *Automated Leave Processing* service step, configure a delay step with these values:

And/Or	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
And	*Completed Leave Request Events*	*equal to*	*Value specified in this filter*	*No*

   See Maintain Step Delay.
4. Review the *Correct Time Off* business process definition. Evaluate whether you need to add new condition rules to any workflow steps or notifications when the correction is initiated by the *Remove Invalid Time Off Entries After Termination* service step.

   Example: You might want to remove approval steps and notification rules. You can either:

   - Add a condition rule to the existing approvals and notifications to prevent them triggering.
   - Create a rule-based business process definition without any approvals or notifications. As a related action on the *Correct Time Off* business process, select **Business Process** > **Copy or Link Business Process Definition**. Select the *Rule Based Workflow Definition Name* option, and enter a name for the rule-based business process definition. As a related action on the rule-based business process, select **Business Process** > **Rule-Based Business Process Configuration**. Add a rule that uses the **Initiated by Remove Invalid Time Off Entries Service** report field to return True if the time off correction is initiated by the service step.

     Example: Create a rule with these values:

And/Or	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
And	*Initiated by Remove Invalid Time Off Entries Service*	*equal to*	*Value specified in this filter*	*Yes*

     In the **Rule Based Workflow Definition** column, select the rule-based business process definition that you just created.
5. Access the **Evaluate and Process Events Impacting Absence** task to run a background job immediately that initiates evaluation and correction of ineligible future time off entries and accrual adjustments. From this point onwards, Workday initiates the background job automatically every 15 minutes.

   Note: If you don't run the **Evaluate and Process Events Impacting Absence** task, Workday continues to flag time off entries that occur after the termination dates in *Termination* business process events until the next Weekly Service Update when we automatically initiate the background job to run every 15 minutes in your tenant.

   If a *Rescind* action occurs on the *Termination* business process, you need to reenter time off entries that start after the original **Termination Date**. If a correction to the **Termination Date** occurs, you might need to manually remove or re-enter time off entries.

Related Information
Concepts

Concept: Completion Steps

Tasks

Configure Rule-Based Business Processes

Reference

2024R1 What's New Post: Termination Impact on Time Off

Steps: Remove Invalid Time Off Entries After Work Schedule Assignment

Prerequisites

Security: These domains:

- *Business Process Administration* and *Manage: Business Process Definitions* in the System functional area.
- *Set Up: Time Off* in the Time Off and Leave functional area.

Context

You can configure Workday to automatically remove approved time off entries after the completion of *Assign Work Schedule* business process events when either the:

- Workers are no longer eligible for the approved time off.
- Entries are no longer valid days to include due to changes in holiday calendars or work schedule calendars.

Invalid time off entries that remain on a worker's calendar after a work schedule assignment can negatively impact reporting, scheduling, balance calculation, and integrations.

You can use the *Remove Invalid Time Off Entries After Work Schedule Assignment* service step to initiate the *Correct Time Off* business process and remove invalid, approved time off entries from the effective date of the worker's work schedule assignment. This step removes the need to find and manually remove these time off entries. Workday automatically creates a *Correct Time Off* event for the approved invalid time off entries and adjusts the units down to zero.

Steps

1. Edit Business Processes.

   On the *Assign Work Schedule* business process, add the *Remove Invalid Time Off Entries After Work Schedule Assignment* service step after the completion step (where **Complete** equals *Yes*). Workday displays an error if you try to add this step before the completion step.
2. After you add the *Remove Invalid Time Off Entries After Work Schedule Assignment* service step for the first time, Workday displays a warning message. Access the **Evaluate and Process Events Impacting Absence** task to run a background job immediately that initiates evaluation and correction of ineligible future time off entries and accrual adjustments. From this point onwards, Workday initiates the background job automatically every 15 minutes.

   If you don't run the **Evaluate and Process Events Impacting Absence** task, Workday continues to flag invalid time off entries that occur on or after the effective date in the Assign Work Schedule business process event until the next Weekly Service Update when we automatically initiate the background job to run every 15 minutes in your tenant.

   Note:

   If Workday doesn't display a warning message when you add the service step to the business process definition for the first time, this means that the background job is already running and there's no need to run the **Evaluate and Process Events Impacting Absence** task.

   If a *Rescind* action occurs on the *Assign Work Schedule* business process, you need to reenter time off entries that start on or after the original effective date. If a correction to the effective date occurs, you might need to manually remove or re-enter time off entries.

3. Create a separate rule-based business process definition for the *Correct Time Off* business process because the *Remove Invalid Time Off Entries After Work Schedule Assignment* service creates correction events that follow the business process definition.

   If you want the service step to automatically remove invalid time off entries without review and approval, create a business process with just a single initiation step (Step a), as follows:

   a) From the related actions menu of the *Correct Time Off* business process, select **Business Process** > **Copy or Link Business Process Definition**.
   b) Select *Rule Based Workflow Definition Name* and enter a name. Example: *Remove Invalid Time Off Service*. Click **OK**.
   c) From the related actions menu of the *Correct Time Off (Remove Invalid Time Off Service)* business process, select **Business Process** > **Rule-Based Business Process Configuration** and click **OK**.
   d) From the related actions menu of Step a, select **Business Process** > **Set as Completion** and click **OK**.
   e) As a related action on the business process, select **Business Process** > **Edit Definition**.
   f) Remove any additional steps and click **OK**.
4. Create Business Process Condition Rules .

   Create a condition rule that uses the **Initiating Business Process of Remove Invalid Time Off Entries Service** report field to identify when the initiating business process is *Assign Work Schedule* :

   a) From the related actions menu of the initiation step, select **Business Process** > **Create Condition Rule** and click **OK**.
   b) Enter a description. Example: A name such as *Time Off Correction Initiated by Remove Invalid Time Off Service After Work Schedule Change?* helps identify the business process condition rule.
   c) Enter a comment to explain the condition. Example: *If time off correction is initiated by Remove Invalid Time Off After Work Schedule Assignment, then exit of a - Correct Time Off notifies Employee as Self* .
   d) Add a rule with these values:

And/Or	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
And	*Initiating Business Process of Remove Invalid Time Off Entries Service*	*in the selection list*	*Value specified in this filter*	*Assign Work Schedule*

   Note: Other possible comparison values are:

   - *Change Job*.
   - *Termination*.
   - Blank, if the correction was not initiated by the service step.
5. Create Custom Notifications .

   To notify employees that Workday is correcting their time off as a result of a *Assign Work Schedule* event, create a custom notification on the rule-based business process definition:

   a) From the related actions menu of the business process, select **Business Process** > **Add Notification** and click **OK**.
   b) Complete the task:

Option	Description
Triggers	From the **On Exit** prompt, select *a - Correct Time Off*.

Option	Description
Conditions and Rules	Add a rule and select the business process condition rule that you created previously.
Groups	Select the *Employee as Self* security group.
Email Message Content	Enter the details: • **Subject:** Add a row to enter text for the subject line. Example: *Time off Correction Submitted on Your Behalf*. • **Body:** Add a row to enter body text. Example: *Workday submitted a time off correction on your behalf due to an Assign Work Schedule event that resulted in invalid time off entries after eligibility changes or the dates changing to non-working days.*

6. Configure Rule-Based Business Processes.

   To ensure that Workday sends notifications to employees for corrections initiated by the service step, create a rule that triggers the rule-based business process when True regardless of the business process that initiated it:

   a) From the related actions menu of the rule-based business process that you created previously, select **Business Process** > **Rule Based Business Process Configuration** and click **OK** .
   b) Add a rule. From the **Rule** prompt, select **Create Condition Rule**, and click **OK**.
   c) Enter a description. Example: A name such as *Time Off Correction Initiated by Remove Invalid Time Off Service* helps you identify the business process condition rule.
   d) Enter a comment to explain the condition. Example: *True if the event is a time off correction that was initiated by a Remove Invalid Time Off Entries Service.*
   e) From the **Copy Condition from Rule** prompt, select the business process condition rule that you created previously. Example: *Time Off Correction Initiated by Remove Invalid Time Off Service After Work Schedule Change?*
   f) Create a rule with these values and click **OK**:

And/Or	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
And	*Initiated by Remove Invalid Time Off Entries Service*	*equal to*	*Value specified in this filter*	Select the check box.

Result

You can initiate the *Assign Work Schedule* business process to verify that the *Remove Invalid Time Off Entries After Work Schedule Assignment* service step is working. See Automatically Assign Work Schedule CalendarsIf workers have approved time off but then have changes in their work schedule calendar that make those days non-working days, Workday removes the time off entries from their calendar on the **Manage Absence** report. Example: A worker's pattern changes from Monday **-** Friday inclusive to Monday, Wednesday, and Friday only, making the entries for the time off on Tuesday and Thursday invalid, effective February 1. Workday removes the time off entries from their calendar.

Related Information

Concepts

Concept: Completion Steps

Tasks

Configure Rule-Based Business Processes

Reference

2025R1 Feature Release Note: Assign Work Schedule Impacts on Time Off

Steps: Set Up Worktags for Time Offs

Prerequisites

Enable the New Absence Calendar Experience. See New Absence Calendar Experience.

Context

You can configure worktags on time offs and allow eligible workers to include worktag values when reporting time off. This increases efficiency and enhances compliance by enabling you to report and allocate these units appropriately.

Example: A worker can select a specific worktag type to report time off against a cost center or project.

Steps

1. To enable worktag types for time offs, access the **Maintain Worktag Usage** report and select **Absence** as the Taggable Type.
2. Select **Edit Worktag Usage** to set up worktag types. Add or remove the worktag types that you want to make available for time offs.

   Note: We support custom worktag types. See Steps: Define Custom Worktags.
3. Access the **Create Time Off** task and use the Worktags tab to add the relevant worktag types. You can configure additional options for each enabled worktag type.
4. (Optional) You can specify:

Option	Description
Option	**Description**
Entry Option	You can select **Hidden** to hide the worktag type for all users when reporting time off or **Required** when you must define a worktag value.
Default Value	You can select a worktag value to populate automatically when entering time off.
Hide from Self Service	Hides worktag type from workers. Use this option if you've enabled a worktag type that should only be accessible when reporting time off on behalf of a worker.
Default from Organization Assignment	You can select the **Default from Organizational Assignment** option for these supported worktag types: • Cost Center • Custom Organization 1-10 • Region • Program • Grant • Gift • Business Unit • Location

Example

You can specify worktag values when reporting time off using supported time off and time tracking entry points including:

Time Off

- Absence Calendar Experience
- Maintain Accrual/Time Off Adjustments/Overrides

Time Tracking

- Micro Edit
- Quick Add
- Enter Time by Week
- High Volume Time Entry
- Enter Time by Type
- Mass Enter Time

Next Steps

If using Workday Payroll, access the **Create Earning** or **Edit Earning** task to add the new Pay Component Group (PCG), Absence Pay Component, to the Pay Component Related Calculation (PCRC) for Hours (unprorated) or Hours (prorated) on a worktag-enabled time off earning.

Workday will create payroll result lines for each pay component and worktag value combination.

Note: If you don't add this PCG, Workday will continue creating a single payroll result line for the pay component, regardless of reported worktag values.

Related Information
Concepts

Concept: Time Off Earnings

Tasks

Configure Related Worktags

Configure Worktags for Transactions

Steps: Define Custom Worktags

Steps: Setup Time Off Plans on page 2102

Steps: Set Up Worktags for Time Entry on page 2496

Reference

2024R1 What’s New Post: Worktags on Time Offs

Create Time Off Types

Prerequisites

Security: *Set Up: Time Off (General)* domain in Time Off and Leave functional area.

Context

Time off types name the time offs that users can select in prompts when they enter or review time off requests. You can associate a time off type with more than a single time off. Example: You might define a time off type called *Vacation* and associate it with 2 time offs: *Vacation Full-Time* and *Vacation Part-Time*. *Vacation* is the name that all workers see.

Note:

If you use the same time off type with more than a single time off:

- Select only time offs that are associated with time off plans that use the same unit of time (hours or days).
- Ensure that workers are eligible for only a single time off at a time. This practice prevents workers from making duplicate requests against a time off plan. Otherwise, they can accidentally double the request against the time off plan balance.

You can also create a single time off with different eligibility or accrual rules for each set of workers. Example: In a time off called Vacation, full-time workers accrue 10 days of vacation while part-time workers accrue 5 days of vacation.

Steps

1. Access the **Maintain Time Off Types** task.
2. (Optional) Enter a **Time Off Type ID** for web services.

   Web service API and EIB uploads use this ID. If you leave this field empty, Workday automatically assigns a value.
3. Enter a **Name**.

Next Steps

Create a time off that uses the time off type. See Steps: Create a Time Off on page 2104.

Note: If you use the same time off type with more than 1 time off, ensure that workers are eligible for only 1 time off at a time. This prevents workers from requesting more than 1 time off with the same name and reducing their time off plan balance twice.

Create Time Off Validations

Prerequisites

- Create a time off.
- Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in Time Off and Leave functional area.

Context

Define rules to warn users of invalid time off requests or prevent workers from entering them.

Workday sets requests displaying warnings that workers submit through the time off calendar to *In Progress*.

Requests for intermittent time off are subject to validation rules for both the time off and the related leave of absence. Time off validations apply when entering time off. Leave validations apply when submitting a time off request or saving it for later. Workday automatically saves requests that fail a leave validation.

Steps

1. Access the **Edit Time Off** task.
2. On the **Validations** tab, add a row in the **Data Entry Validation** table for each validation you need to add.

   Any values you enter must be compatible with the unit of time defined for the time off plan balance.

   Complete the fields appropriate for the validation rule. The table lists fields that apply to all rules last.

Field	Description
Consecutive Day Maximum and *Consecutive Day Minimum*	For the value, specify the:

Field	Description

	• Maximum number of consecutive days a worker can take time off.
	• Minimum number of consecutive days workers must enter in a single request.
	
	Specify a positive number or a calculation that evaluates to a positive number.
	
	To require an exact number of consecutive days off, combine the **Consecutive Day Maximum** validation with a **Consecutive Day Minimum** validation that has the same value.
	
	These validations:
	
	• Reference the **Days to Include** option on the time off plan when determining which days are consecutive. Example: When **Days to Include** is:
	    • *All Days* and a worker takes time off on Thursday, Friday, Monday, and Tuesday, Workday evaluates the time off as 2 sets of 2 consecutive days, not 4 consecutive days.
	    • *Weekdays (Mon - Fri)* and a worker takes the same days off, Workday evaluates the time off as 4 consecutive days.
	• Ignore the **Include All Selected Days** setting.
	
	Note: Workday uses these validations to evaluate short-term time offs. Defining a consecutive day maximum or minimum greater than 30 days can slow down time off performance.
	
	The **Consecutive Day Minimum** validation isn't available for time offs entered through Time Tracking.

Increments	Specify the increments for entering time off. Example: Select a constant value, such as 4 hours or 0.5, or a calculation that returns different values for full-time and part-time workers.
Maximum	Specify the maximum amount of time off workers can request. Example: Select a constant value, such as 8 hours or 1 day, or a calculation that returns different limits based on a worker's work schedule calendar, holiday schedule calendar, or both. You can set limits dynamically based on the number of hours the worker is scheduled to work on the time off date. Example: 8 hours Monday, Tuesday, Wednesday, and Thursday; 12 hours on Friday, and zero hours on holidays.

Field	Description
	Example: You can use the *Published Scheduled Hours for All Positions for Calendar Day (Workday Scheduling)* instance value calculation (IVC) in a *Maximum* validation on a time off such as vacation as part of a calculation to return 0 if the worker's published hours are greater than 0. This prevents or warns the worker that they're requesting a planned absence for a day that they're scheduled to work. Specify whether the maximum applies to: • Each request (*Individual Time Off Entry*). • All time off entries for the same date. • Requests for the same date for the time offs you select in the **Time Off Validation Set** field. If the time off belongs to a position-based time off plan, you can apply the maximum to all or selected time off entries for the same position and date.
Maximum Unpaid Time Off Units Allowed	Enter the maximum amount of unpaid time off allowed for a worker at any point in time. Must be a positive number. Applies only to time off plans that track balances and have a lower limit, or a time off limit override. To prevent unpaid time off, enter *0* (zero).
Minimum	Specify the minimum amount of time off workers can request for each time off entry, not the sum of time off entries each day. Example: Select a constant value, such as 4 hours or 0.5, or a calculation that returns different values for full-time and part-time workers.
Multiple Time Off Requests Not Allowed for Same Date	Specify whether the rule applies to: • All time off entries for the same date. • Requests for the same date for the time offs you select in the **Time Off Validation Set** field. If the time off belongs to a position-based time off plan, you can apply the rule to all or selected time off entries for the same position and date.
Time Off Date before Maximum Override Balance Date Not Allowed	Prevents the entry of time off requests for dates before the most recent **Override Balance Date** on the **Maintain Time Off Override Balances** task. (Applies only to time off plans that track balances.) Example: If the most recent **Override Balance Date** is 2016-01-01, workers can't enter time off requests for dates before this.

Field	Description
Do Not Allow Request	Display an error message when a request fails the validation. Depending on the type of validation, you can clear the check box to generate a warning message instead. Example: Clear this check box for a *Maximum Unpaid Time Off Units Allowed* validation to enable workers to submit requests for unpaid time off. A manager or administrator can reject the request. Applies to all validation rules.
Allow Override for Entry on Behalf of Worker	Enable managers or administrators to override the validation rule when entering, revising, or correcting time off on behalf of workers. A warning message displays when managers, administrators, or partners enter invalid requests. Applies to all validation rules.
Custom Text	Select a message that displays after the standard error or warning message, unless you select **Display Custom Text First**. Custom text doesn't display on mobile devices. Use the **Maintain Time Off Data Validation Custom Text** task to define custom text. Applies to all validation rules.
Hide Default Validation Text	Select to hide the default validation text when a worker enters a time off request if custom text is defined on the validation. **Note:** Workday displays the validations from the effective dated snapshot of the time off plan when the worker entered their time off request. Updates in subsequent snapshots don't display.

Example

This example shows how to apply validation rules. Sondra enters a request for 4 hours of Floating Holiday and a second request for 5 hours of Vacation time for June 7.

- If you limit Vacation requests to a maximum of 8 hours and select *All Time Off Entries for Worker for Same Date* in the **Time Off Entries to Include** field, Workday rejects Sondra's second request because it exceeds the maximum time off for all time off entries for that date.
- If the *Multiple Time Off Requests Not Allowed for Same Date* rule is in effect instead, and the validation set includes Floating Holiday and Bonus, Workday accepts Sondra's second request because there are no restrictions on Vacation requests.

Next Steps

(Optional) Access the **Maintain Time Off Data Validation Custom Text** task to display a custom message.

Create Time Off Plans That Track Balances

Prerequisites

- Create period schedules and balance periods.
- Create time offs and accruals.
- Security: *Set Up: Time Off (Calculations - Absence Specific)* and *Worker Data: Time Off (Time Off Balances)* domains in Time Off and Leave functional area.

Context

Time off plans that track balances identify accruals that add to the plan balance and time offs that subtract from the balance. They specify the unit of time to use for time off requests and accruals. They also specify the default eligibility rules workers must meet to accrue and take time off. Time off plans that track balances identify a period schedule and the plan balance period, and they can specify a carryover limit. Plans that track balances can pass time off to Workday Payroll or Workday Payroll Interface for use in payroll calculations.

All time off, accruals, and other calculation values associated with a time off plan must use the same unit of time.

Steps

1. Access the **Create Time Off Plan** task.
2. Enter a **Name** and, optionally, a **Display Name**.

   Use these fields to identify the time off plan for administrators while displaying a more meaningful name for self-service users. If no display name exists, self-service users see the name of the time off plan.
3. Select **Position Based** to track time off for workers by position.

   You can't change this setting after time off requests, accruals, or other time off data exist for the plan.

   Workday displays the check box if you configure your tenant to support multiple jobs on the **Edit Tenant Setup - HCM** task (**Position Setup Options** field).

   If you don't select **Position Based**, Workday treats the plan as worker-based. Workers on a worker-based plan can still enter their position on time off requests if you select the **Require Position on Time Off Request** option when creating or editing the time off. For worker-based plans, Workday refers to the worker's primary position when applying eligibility and validation rules, unless your rules reference calculations that Workday applies across all jobs.

   If you select **Position Based**, you can't use front-loaded or based-on-as-of-date accruals with this time off plan because these service steps don't support position-based plans:

   - *Automated Accrual Adjustment*
   - *Bulk Automated Accrual Adjustment*

   However, you can create a worker-based time off plan and select the **Require Position on Time Off Request** option on the time off configuration. Worker-based time off plans can use front-loaded or based-on-as-of-date accruals.
4. Select a **Period Schedule**.

   The period schedule defines accrual frequencies (except for accruals with a custom frequency), and reporting periods for the plan. Plan eligibility rules that refer to period start or end dates also use the period schedule.

   Example: Select *Monthly* to calculate accruals, and to process and track time off requests and adjustments on a monthly basis.

   Note: Don't use daily period schedules in time off plans. Workday recommends that you select a weekly schedule at a minimum.
5. Select **Track Balance** to enable balance tracking.

6. (Optional) In the **Default Payslip Name** field, enter the name to use for the time off plan on payslips, if different from the time off plan name.

   This field doesn’t apply to Payroll Interface.
7. Select a **Unit of Time**.

   A worker can have both hour-based plans and day-based plans, but each plan must use a single unit of time.

   All time off, accruals, limits, and other calculation values associated with a time off plan must use the same unit of time. Workday doesn't convert hourly values to daily values or daily values to hourly.
8. On the **Balance** tab, consider:

Option	Description
Balance Period	Specify the period of time over which to accumulate balances for accruals, time offs, and the time off plan balance (accruals minus time off). Workday provides most of the balance periods that you need for time off plans; however, you can create your own, if necessary. This field isn't effective dated. If you modify the balance period, Workday applies the new balance period starting on the date you created the time off plan.
Balance Visibility	Select a balance visibility option to control whether workers, managers, and administrators can view time off balances. It also specifies the period of visibility after a worker loses eligibility for the plan: • *Eligible in balance period (based on As of Date)*: Display balances if the worker is eligible for time off at any point during the balance period. The balance reflects the *As Of* date that the worker enters to view balances. Example: The balance period is January 1 to December 31. Sue is eligible for time off from January through March. She can view her balances using an *As Of* date in June, but not February 1 of the next year. • *Eligible in period (based on As of Date)*: Display balances if the worker is eligible at any point in the period that includes the *As Of* date. Example: John loses eligibility for time off midway through the January 1 - 31 period. He can see his balances if he selects an *As Of* date of January 31, but not if he selects February 1. • *Eligible in period or prior periods (based on As of Date)*: Display balances if the worker is or

Option	Description
	was eligible for time off on or before the *As of* date. Workers who are no longer eligible can view time off and accrual totals as of the last period they were eligible. • *Never show balance*. To decide whether to track and display balances for time off plans with intermittent time off, consider if you'll use the intermittent time off to reduce a: • Leave balance. • Leave balance, as well as a time off plan.
Calendar Display	Select to display the time off plan name, the time off type name, or both, with a worker's time off balances.
Hide from Worker Self Service	Select to hide the balance for the time off plan from workers. Useful for balances that workers don't need to see, such as Jury Duty or Bereavement.
Overrides Allowed	Enable the balance override for the start date of any period that the worker is eligible for. You can use the **Maintain Time Off Plan Override Balances** task to configure overrides.
Balance Transfer Default(s)	(Optional) Select which time off plans Workday transfers balances to when a worker loses eligibility for this plan because of a job change. See Steps: Transfer Time Off Balances.

9. In the **Carryover** section, consider:

Option	Description
Date	Specify when to reset year-to-date balances for time offs and accruals, and carry over remaining time off plan balances: • *Balance Period Start Date*: Carry over balances on the first day of the next time off plan balance period. Typically, this option is appropriate when the period schedule aligns with the start of the plan balance period. • Example: A monthly period schedule and a January to December balance period. **Prerequisite**: Select a period for **Balance Period** that has a **Period Date Indicator** set to *Based on Period End Date*. To verify, click the related actions of the selected balance period to preview the details. • *First Period of Balance Period Start Date*: Carry over balances on the first day of the first period in the next balance period of the plan.

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td></td><td>Example: Time offs or accruals can occur in a period that spans 2 plan years. This option enables Workday to update the balance for the new year.

Example: The balance period (plan year) is January 1 to December 31, 2011. The period schedule is biweekly and the December 24, 2011 - January 4, 2012 period crosses 2 plan years.
If you select Balance Period Start Date, carryover occurs on January 1, 2012.
If you select First Period of Balance Period Start Date, carryover occurs on December 24, 2011.
Carryover occurs before accruals when both happen the same day.</td></tr>
<tr><td>Limit</td><td>Specify the maximum number of units workers can carry over from 1 balance period to the next. Example: A constant value of 10 days or a calculation that returns 50% of the balance from last year.

To ensure that carryover balances expire, enter a value. If workers can carry over their full balance, enter a value that they can't reach based on the plan accrual, such as 999999999 Days.

Units that exceed the limit display as Carryover Forfeited throughout Workday.</td></tr>
<tr><td>Amount of Time before Expiration</td><td>The number of days or months after the carryover date that carryover units expire. Select a constant value, such as 15, or a conditional calculation.
Leave this field empty if carryover units never expire for any workers.
Use a conditional calculation that returns zero, if carryover units only expire under certain conditions.

Examples:
Carryover units for full-time workers expire after 30 days but never expire for part-time workers. Define a calculation that returns 30 for full-time workers and zero for part-time workers.
Carryover units for the 2014 balance period never expire, but expire after 30 days beginning with the 2015 balance period. Create a calculation that returns zero for the 2014 balance period and 30 days for the balance periods that follow.</td></tr>
<tr><td>Unit of Time for Expiration</td><td>Select Days or Months as the unit of time for measuring the expiration date.</td></tr>
</table>

Option	Description
	Example: If carryover units expire 2 months after the carryover date, select: • *2* for **Amount of Time Before Expiration**. • *Months* for **Unit of Time for Expiration**.
Include Carryover in Time Off Plan Balance Upper Limit Calculation	Select the check box to include carryover units in the upper limit calculation. Example: You can configure a time off plan where carryover expires after 3 months and doesn't force the worker's balance to exceed the plan configuration.
Use Time Off Accrual Before Carryover Balance	Select the check box to have time off requests reduce a worker's accrued time off before their carryover balance. If the check box is unchecked, the time off requests reduce the carryover balance before the accrual.

Use the **Maintain Time Off Plan Carryover Overrides** task to override the time off plan defined carryover rule for an individual worker. See .

10. On the **Calculation** tab, select an **Accrual Frequency Method for Time Off Plan** option to specify when to add the accrual to a worker's plan balance:

    - *Start of Period*: Before subtracting time off. Valid for front-loaded and based-on-as-of-date accruals.

      Note: Workers often reach upper limits sooner and lower limits later than if you use *End of Period*.
    - *End of Period*: After subtracting time off. Invalid for front-loaded accruals. Valid for based-on-as-of-date accruals.
    - *Custom Frequency*: Add accrual on the dates that you define in the next 3 fields. Invalid for based-on-as-of-date accruals or front-loaded accruals.
11. If you selected *Custom Frequency* for **Accrual Frequency Method for Time Off Plan**, define the frequency.

    On the **Calculation** tab, consider:

Option	Description
First Accrual Date	Select the calculation that returns the first date of the accrual, such as *Worker: Hire Date* or *Worker: Time Off Service Date*, or create a date calculation to return this date. Example: Create a date increment/decrement calculation that returns a worker's hire date plus 30 days. The accrual occurs on the last day of the month, if both are true: • The hire date falls on the 31st day of the month. • The next month has fewer than 30 days. Workers must still meet scheduling criteria for the accrual to occur on this date.

Option	Description
Accrual Recurs Every	Enter the number of recurring units of time (days or months) after the first accrual date when the accrual is to occur. Example: Enter *1* if the accrual occurs every month on the anniversary of the first accrual date.
Accrual Recurs Unit of Time	Specify if the recurrence interval represents *Days* or *Months*.

12. On the **Calculation** tab, consider:

Option	Description
Time Off Plan Balance Lower Limit	Control how much time off to pay when workers exceed their available balance. Select a constant value, such as -40 hours or 5 days, or a calculation to define the amount. Workday considers the time off units that reduce the balance below the limit as unpaid. Example: The vacation plan has a lower limit of -16 hours. John uses all of his vacation time (balance = zero) and then takes 10 more hours. Workday pays all 10 hours because they all fall within the lower limit. However, if John requests an additional 10 hours, Workday pays only 6 of them and tracks the remaining hours as unpaid time. You can use time off validation rules to prevent workers from requesting unpaid time off. Enter zero to indicate that Workday shouldn't pay time off when workers reduce their time off balance to zero. Enter a negative value to enable workers to receive paid time off when their balance falls below zero.
Time Off Plan Balance Upper Limit	Specify the maximum number of hours or days workers can accumulate in their time off plan balance. You can also select a calculation that returns the amount. The balance amount that exceeds the limit displays as *Forfeited* accrual hours on Workday pages and reports.
Daily Quantity Default	Select a default value to display when you enter time off for this plan. If you select a conditional calculation, the default quantity is based on the first day requested. Examples: • You can use calculations that return a worker's scheduled hours, or 8 for workers without a schedule. Jane enters a request for personal time off for Monday, Tuesday, and Friday.

Option	Description
	Because she's scheduled to work 4 hours on Monday, the default quantity for each day of the request is 4. • Arithmetic calculations such as*Scheduling Worker - Scheduled Shifts: Shift Hours (Based on As of Date) no rounding* enable you to configure dynamic values to guide workers to enter correct values. To define a default quantity for a time off that overrides the default quantity of the plan, use the **Create Time Off** or **Edit Time Off** tasks. Workday generates an error if the generated quantity either: • Exceeds the maximum validation value. • Causes a request to fail other validations that you defined.
Days to Include	Workday automatically checks your selected days against the time off validations and the options that you select for this field. Your selections, together with the **Restrict Requests to Days to Include on Calendar** check box, control the days for which workers can enter time off. The *Workdays (Non-Holiday)* and *Workdays (Work Hours exceed Holiday Hours)* options require you to set up holiday and work schedule calendars. When you select the *Configure Days To Include* option, you can: • Select specific days from the **Included Days** prompt. Workday counts these days when workers request time off. Example: The Global Modern Services international office doesn't have Monday to Friday as the standard working week. Using this option they define Sunday to Thursday as the working week. • Specify that time off is available on a public holiday. Select the **Include Holidays from Holiday Calendar** check box.
Use Scheduling Shifts	Select to determine working days from Workday Scheduling. When workers are part of a scheduling organization, and have a published schedule for the week of their time off request, Workday uses the published schedule, otherwise Workday considers the **Days to Include** configuration on the time off plan. Workday uses the work schedule calendar when **Days to Include** is *Workdays (Non-Holiday)*. Although Workday Scheduling supports multiple positions, you can’t select this check box on

Option	Description
	position-based time off plans. However, when you select **Use Scheduling Shifts** on a worker-based time off plan, and a worker with multiple positions requests time off against the plan, if there's a published schedule for the week for the worker for any position, Workday prevents them requesting time off on days that they're scheduled to work.
Restrict Requests to Days to Include on Calendar	Applies when using the **Request Absence** and **Enter Absence** tasks: • Select to restrict time off requests to the days specified by **Days to Include** option. • Clear to enable workers to enter time off for any day. Select **Include All Selected Days** to include days outside of the **Days to Include** selection.

13. On the **Accrual** tab, select the accruals that add to the time off plan balance.

    The grid identifies whether the selected accruals have an accrual frequency, eligibility rule, or upper limit that overrides the plan rules.
14. On the **Time Off** tab, associate time offs with the plan in the **Subtracts from Balance** grid.

    The override check boxes identify time offs that have an eligibility rule, lower limit, or quantity default that differs from the plan rules. The time off rules override the plan rules.
15. (Optional) In the **Payout Time Offs** section, consider:

Option	Description
Time Off for Balance Transfer Adjustment	Workday uses the time off to create an adjustment that offsets the plan balance when a worker loses eligibility because of a job change.
Time Off for Termination Adjustment	Workday uses the time off to create an adjustment that offsets the plan balance at termination.

16. On the **Eligibility** tab, consider:

Option	Description
Enabled for Worker Type Plan Eligibility	Specify whether the time off plan is available for employees, contingent workers, or all workers.
Country/Country Region	Select the countries or country regions in which the time off plan applies. This setting limits the number of eligibility rules that Workday must evaluate for a worker. It filters time off plans by country or country region before evaluating other eligibility criteria: • Position-based time off plans evaluate the location associated with each of a worker's positions. • Worker-based time off plans evaluate the location associated with the worker's primary position.

Option	Description
	Time off plans evaluate the location as of the period start date or the period end date. If your country eligibility rules are more specific, you must define additional eligibility rules. Example: Workers must live in the specific country as of the period end date. You can set the **Country/ Country Region** for some or all of your time off plans with the **Maintain Time Off Plan Country/ Country Region Eligibility** task.
Country/Country Region Enabled for All Positions	(Optional) Available for worker-based time off plans only. Workday overrides this setting when you also select **Require Position on Time Off Requests** on time offs on the plan. Select to enable workers on international assignment to select the time off plans for their current assignment. You can select this option if you enable **Country/ Country Region** values for the worker's country. Example: Marc works in Toronto, but goes on an international assignment to China. He becomes eligible for the *China Vacation* plan, but can't access the plan when requesting time off. The administrator has enabled the *China Vacation* plan in the **Country/Country Region** field. However, to make the *China Vacation* plan available for Marc, you need to select the **Country/Country Region Enabled for All Positions** check box. Workday automatically checks for country or country region plans that Mark is eligible for.
Worker Eligibility	Select additional eligibility criteria for the time off plan. These eligibility rules apply to all time offs that you associate with the plan, unless you define additional rules for a specific time off.

Example

Effects of Days to Include Option: Restrict Requests to Days to Include on Calendar

Cynthia wants to take *Vacation* time off on Friday and the next Monday. On the calendar, she selects the date range of Friday through Monday.

The **Days to Include** option for the *Vacation* plan is *Weekdays (Mon - Fri)*.

Workday processes time off requests differently depending on the **Restrict Requests to Days to Include on Calendar** check box setting. If you:

- Select it, Workday considers that Cynthia is requesting time off for 2 days.

	• Clear it, Workday displays the **Include All Selected Days** check box when workers enter time off. If Cynthia selects it, Workday considers her requesting time off for 4 days.
Effects of Days to Include Option: Configure Days to Include	Workday processes time off requests differently depending on the **Include Holidays from Holiday Calendar** check box and **Included Days** settings. When you: • Select **Include Holidays from Holiday Calendar**, Workday only includes days that you select in the **Included Days** prompt that are a holiday. • Clear it, Workday doesn't include any days that you select in the **Included Days** prompt that are a holiday. As an HR Administrator for Global Modern Services, you select the **Include Holidays from Holiday Calendar** check box. A holiday occurs on a Friday. However, because you only selected *Saturday* and *Sunday* from the **Included Days** prompt, when processing a time off request for Friday, Saturday, and Sunday, Workday doesn't include Friday.

Next Steps

- Review the **All Time Off Plans** report to verify the configuration of the time off plan.
- Run the **Evaluate Absence Calculation** task to validate calculations for an eligible worker.

Related Information

Concepts

Concept: Accrual and Time Off Limits on page 2176

Concept: Time Off Earnings

Setup Considerations: Time Off Calculations for Payroll

Tasks

Steps: Create Calendars

Steps: Set Up Time Off Plans on page 2102

Evaluate Absence Eligibility on page 2424

Override Time Off Plan Carryover on page 2296

Steps: Set Up Sell Time Off on page 2244

Reference

Reference: Feature Availability and Balance Tracking on page 2191

The Next Level: PATT Touchpoints with Assignments

2025R1 Feature Release Note: Connected Experience: Scheduled Days to Include

Examples

Example: Configure Accruals Relative to Hire Date and Years of Service on page 2206

Create Time Off Plans That Don't Track Balances

Prerequisites

- Create time offs.

- Create period schedules if plan eligibility rules refer to period start or end dates.
- Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in Time Off and Leave functional area.

Context

Time off plans that don't track balances include 1 or more time offs. They specify the unit of time for recording and processing time off requests and the default eligibility rules for taking time off.

Steps

1. Access the **Create Time Off Plan** task.
2. Enter a **Name** and, optionally, a **Display Name**.

   Use these fields to identify the time off plan for administrators while displaying a more meaningful name for self-service users. If there’s no display name, self-service users see the time off plan name.
3. To enable entering time off requests by position, select the **Position Based** check box on the **Balance** tab.

   You can't change this setting after time off requests, accruals, or other time off data exists for the plan.

   Workday displays the check box if you configure your tenant to support multiple jobs on the **Edit Tenant Setup - HCM** task (**Position Setup Options** field).

   Select the worker's position when the time off plan is position-based. Workday bases eligibility and validation rules on the position for the time off request. But, you can also define these rules to reference the worker's primary position or all positions.

   If you don't select **Position Based**, Workday treats the plan as worker-based. Workers on a worker-based plan can still enter their position on time off requests when you select the Require Position on Time Off Request option. Workday refers to the worker's primary position when applying eligibility and validation rules, unless your rules reference calculations that Workday applies across all jobs.
4. On the **Calculation** tab, consider:

Option	Description
Unit of Time	A worker can have both hour-based plans and day-based plans, but each plan can use only 1 unit of time.
Period Schedule	Select only if an eligibility rule refers to a period start date or end date. Example: If a worker must be full-time as of the current period start date to participate in a time off plan, you must select a period schedule.
Days to Include	Controls which days to include in time off requests, by default. It works with the **Restrict Requests to Days to Include on Calendar** check box to control the days on which workers can enter time off. The *Workdays (Non-Holiday)* and *Workdays (Work hours exceed Holiday hours)* options require the setup of holiday and work schedule calendars.
Restrict Requests to Days to Include on Calendar	Applies when using the calendar for the **Request Time Off** and **Enter Time Off** tasks:

Option	Description
	• Select to restrict time off requests to the days specified by **Days to Include** option. • Clear to enable workers to enter time off for any day. Select **Include All Selected Days** to include days outside of the **Days to Include** selection.
Daily Quantity Default	Select a default value to display when you enter time off for this plan. If you select a conditional calculation, the default quantity is based on the first day requested. Example: You select a calculation that returns a worker's scheduled hours, or 8 for workers without a schedule. Jane enters a request for personal time off for Monday, Tuesday, and Friday. Because she's scheduled to work 4 hours on Monday, the default quantity for each day of the request is 4. To define a default quantity for a time off that overrides the default quantity of the plan, use these tasks: • **Create Time Off** • **Edit Time Off** Workday displays an error if the automatically populated quantity either: • Exceeds the maximum validation value. • Fails other validations that you defined.

5. On the **Time Off** tab, associate time offs with the plan in the **Subtracts from Balance** grid.

   The override check boxes identify time offs that have an eligibility rule, lower limit, or quantity default that differs from the plan rules. The time off rules override the plan rules.
6. On the **Eligibility** tab, consider:

Option	Description
Enabled for Worker Type Plan Eligibility	Specify whether the time off plan is available for employees, contingent workers, or all workers.
Country/Country Region	Select the countries or country regions in which the time off plan applies. This setting limits the number of eligibility rules that Workday must evaluate for a worker. It filters time off plans by country or country region before evaluating other eligibility criteria. • Position-based time off plans evaluate the location associated with each of a worker's positions. • Worker-based time off plans evaluate the location associated with the worker's primary position. Time off plans evaluate the location as of the period start date or the period end date. If your

Option	Description
	country eligibility rules are more specific, you must define additional eligibility rules. Example: Workers must live in the specific country as of the period end date. You can set the **Country/ Country Region** for some or all of your time off plans with the **Maintain Time Off Plan Country/ Country Region Eligibility** task.
Worker Eligibility	Select additional eligibility criteria for the time off plan. These eligibility rules apply to all time offs that you associate with the plan, unless you define additional rules for a specific time off.

Example

Effect of Days to Include Option when Entering Time Off through the Calendar	Cynthia wants to take Vacation time off on Friday and the following Monday. On the calendar, she selects the date range of Friday through Monday. The **Days to Include** option for the Vacation plan is *Weekdays (Mon - Fri)*. If the **Restrict Requests to Days to Include on Calendar** check box is: • Selected, Workday considers that Cynthia is requesting time off for 2 days. • Cleared, Workday displays the **Include All Selected Days** check box. If Cynthia selects it, Workday considers that she's requesting time off for 4 days.

Related Information
Concepts

Concept: Eligibility for Time Off Plans, Time Off, and Accruals on page 2142

Tasks

Steps: Set Up Time Off Plans on page 2102

Steps: Create Calendars

Reference

The Next Level: PATT Touchpoints with Assignments

Change Absence Partner Role Assignments

Prerequisites

- Configure the *Assign Roles* business process and security policy in the Organizations and Roles functional area.
- Security: *Manage: Supervisory Organization* domain in the Organizations and Roles functional area.

Context

When an absence partner supports their own supervisory organization, you can change the worker who has the *Absence Partner* role for that organization. This prevents absence partners seeing the time offs in time off segments secured by the *Absence Partner* role when requesting time off in an employee self-service context.

Steps

1. Access the **View Supervisory Organization** report and select a supervisory organization. Example: Property Management.
2. Select the **Roles** tab of the supervisory organization.
3. In the **Assigned To** column, drill into the worker assigned to the *Absence Partner* role for that organization and select the **Supervisory Organization** that the worker belongs to.
4. On the **Members** tab, identify a different absence partner who you can assign as the *Absence Partner* for the absence partner's own supervisory organization.
5. Drill into the worker to access the worker's profile.
6. In the **Job Details** section, from the related actions menu of the **Position**, select **Roles** > **Assign Roles - Add/Remove**.
7. Add a row and specify values for these prompts:

Field	Value
Role Enabled For	Select a different supervisory organization. Example: A Benefits organization.
Role	*Absence Partner*

Related Information
Concepts

Setup Considerations: Roles

Setup Considerations: Role-Based Security Groups

Tasks

Steps: Set Up Segmented Security for Time Off on page 2108

Concept: Relationship of Time Off Plan Components

A time off plan defines rules for entering and tracking 1 or more related time offs. When you set up time off plans, workers and managers can enter time off requests, correct requests, and track the status of requests through self-service pages and reports. Administrators can track, adjust, and manage accrual, time off, and time off plan balances.

Components of Time Off Plans

To build a simple plan that supports basic time off entry and approval, create time offs and add them to a time off plan.

Time off plans that track accrual and time off balances include additional components:

- Time offs
  - Time off types
  - Validation text
- Accruals
- Balance Period
- Period Schedule

Time Off Priorities and Accruals

When a period includes an accrual with a custom frequency, Workday processes time offs by priority for the days taken before the accrual. Workday processes time offs taken after the accrual separately.

The accrual for Lisa's time off plan occurs on the 15th of each month. Lisa requests:

- March 4: Sick time (priority 3).
- March 5: Vacation (priority 1).

- March 20: Floating holiday (priority 2).
- March 21: Vacation (priority 1).

Before processing the accrual, Workday processes the time off in this order:

- March 5 vacation.
- March 4 sick time.

After processing the accrual, Workday processes the time off in this order:

- March 21 vacation.
- March 20 floating holiday.

Concept: Entering Time Off in Absence and Time Tracking

You can configure time offs so that workers can enter them through Absence, Time Tracking, or both. On the **Create Time Off** task, the entry options are represented as:

- *Enter through Time Off Only*
- *Enter through Time Tracking Only*
- *Enter through Time Tracking or Time Off*

Absence and Time Tracking handle time off entry in different ways. Time offs entered in Absence follow the *Request Time Off* business process and time offs entered in Time Tracking follow the *Enter Time* business process. Time offs that can be entered in both Absence and Time Tracking follow whichever business process was used to enter the time off.

These are some considerations to take when deciding which entry option to apply to a time off:

Consideration	Entered through Time Off	Entered through Time Tracking
Time off approvals	Reviewers approve time offs separately from time entries. When you approve time entries, time offs aren't included in task totals for submitted time in**My Tasks**.	Reviewers approve time offs and time entries in the same event. All hours are included in the task totals for submitted time in **My Tasks** .
Viewing balances when approving	Approvers can see time off balances as of the current date.	Approvers can't see time off balances.
Submitting time off across weeks	You can request a time off that spans multiple weeks in one request.	If a time off request spans multiple weeks or time periods, you must submit each week or time period separately.
Submitting different time off types	You must submit a separate request for each time off type.	You can enter and submit multiple time off types within a single week or time period.
Time Tracking calculations	If your tenant is configured for it, approving a time off request causes Time Tracking to recalculate time for any overlapping weeks. If this recalculation causes any approved time blocks to update, you must re-submit them for approval.	Calculations automatically trigger when you enter the time off on the time entry calendar.

Consideration	Entered through Time Off	Entered through Time Tracking
	If your tenant doesn't automatically run time calculations upon time off approval, you must recalculate each worker's time in Time Tracking.	
Entering In/Out times	You can't record In/Out times for time offs.	You can record In/Out times for time offs.
Mass Entry	You can load time offs into Absence using the *Enter Time Off* web service.	You can't load time offs into Time Tracking using a web service.
Attachments	You can configure the *Request Time Off* business process to allow or require workers to attach supporting documents to time off requests. You can control who has access to the documents using segment-based security groups.	You can attach documents to individual time blocks. The *Enter Time* business process doesn't support attachments.
Future-dated time off	Absence Management period schedules are typically built out at least a few years into the future to allow for balance forecasting. As long as a period schedule exists for a date in the future, you can request time off for that date. You can use business process validations to restrict the submission (but not entry) of future-dated time off requests.	Time Tracking period schedules can be configured to open a week or period for time entry as of a specific date. This is typically not very far into the future so as to promote accurate time entry. You can enter time offs when a Time Tracking period is open. If you enter and approve a future-dated time off and then you add or change time for that week or time period when it becomes current, you must resubmit and reapprove that week or time period.
Retroactive time off	As long as a period schedule exists for a date in the past, you can request time off for that date. You can also use business process validations to restrict the submission (but not entry) of past-dated time off requests.	Time Tracking period schedules can be configured to lock for payroll processing and also permanently close a week or period for time entry as of a specific date. You can't enter a time off when a Time Tracking period is locked or closed for time entry.

Related Information
Concepts

Concept: Time Tracking and Absence Management on page 2607

Tasks

Steps: Create a Time Off on page 2104

Concept: Eligibility for Time Off Plans, Time Off, and Accruals

Workers are eligible for time off and accruals based on:

- The eligibility rules that you add to a time off plan.
- The eligibility fields on the time off plan.

Workday first evaluates worker eligibility for a time off plan before evaluating eligibility rules associated with the time off plan.

- Eligibility Rules
- Pointers for Defining Eligibility Rules
- And/Or Logic
- Time Off Plan Filters
- Where to Add Eligibility Criteria on page 2144

Eligibility Rules

You can create calculations to use as eligibility rules on time off plans. The eligibility rules specify the conditions that workers must meet for a period to take time off and accrue it. Each rule identifies:

- The condition.
- When the worker must meet the condition such as the period start date or period end date.

Example: Employees must work full-time at Global Modern Services as of the period start date. Employees who meet this condition remain eligible for the time off plan for the entire period. Even if they switch to a part-time position or change companies later in the period.

By default, all accruals and time off associated with a time off plan have the same eligibility criteria as the plan. If eligibility criteria for a particular accrual, or time off, differ from the plan, you can configure the accrual or time off to override the eligibility criteria of the plan.

Additionally:

- The only eligibility criteria that you need to define for a time off plan is the worker type. All workers of the specified type are eligible for the plan, including accruals and time off, if:
  - The time off plan has no other eligibility criteria.
  - The time off and accruals have no eligibility override instructions.
- When an accrual has eligibility override instructions, workers must meet the accrual eligibility criteria (not the plan) to receive the accrual.

  Example: Workers must work full-time to be eligible for the time off plan. Full-time workers with 2 or more years of service are eligible for a bonus accrual within the plan. Override criteria for the bonus accrual must specify that the worker:
  - Is full-time.
  - Has completed 2 or more years of service.
- Workday checks a worker's eligibility for a time off during the entry of a time off request. The **Type** prompt displays only those time offs that the worker is eligible for, on either:
  - The request date.
  - The first day of the request, if using the calendar to select multiple dates for the same request.

  Workday also checks eligibility for each date requested through the calendar, displaying an error message when a worker isn't eligible for dates within the request.
- For intermittent time off, a worker must meet the eligibility criteria for both the time off and its related leave. Workday applies the time off eligibility rules first.

Pointers for Defining Eligibility Rules

You can use instance set comparison calculations, logic calculations, and value comparison calculations to define eligibility criteria. Workday delivers calculations and report fields that you can use within your own calculations, most of which are based on the period start date or period end date. The dates depend on the period schedule of the time off plan.

When defining eligibility criteria:

- Ensure they cover workers hired or terminated midperiod, if they're eligible for a plan.

  Example: Your eligibility criteria specify that workers must be full-time as of the period start date. Consequently, you add criteria for newly hired workers based on period end date. Conversely, you base criteria for most workers on period end date. You then include criteria for terminated workers based on period start date.
- Understand how to use And/Or logic.
- If using Workday-owned calculations and report fields, use the calculations and report fields in the *Absence* or *Common* category.

  Don't use calculations related to subperiods as they are for Payroll use only.
- If you use custom organizations in your time off rules, avoid using:
  - Report fields involving default organizations.
  - Custom organizations having dynamic membership rules that return more than 3,000 workers or that **Include Subordinate Organizations in Rule**.

    Workday recommends that you use static or semidynamic usages for membership rules that return more than 3,000 workers. Alternatively, use another organization report field that returns a subset of the workers eligible for a plan.
  - Calculations must use the period start date or include an additional calculation to check that the worker isn't terminated as of the period end date. This avoids terminated workers inadvertently becoming eligible for time off plans, time offs, accruals, or both.

And/Or Logic

When you define eligibility rules, you can select one or more calculations in the same row or in different rows. This distinction is important:

- AND logic applies to criteria in the same row.
- OR logic applies to criteria in separate rows.

When criteria are in a single row, workers must meet all criteria (AND logic). When you define multiple rows of criteria, a worker must meet all criteria in at least 1 row (OR logic).

Criteria with AND logic

Example: Employees must work for GMS Company AND have an employee type of *Regular* to qualify for time off.

Worker Eligibility
Company = GMS Employee Type is Regular

Criteria with OR logic

Example: Employees must work for GMS Company OR have an employee type of *Regular* to qualify for time off.

Worker Eligibility

Company = GMS
Employee Type is Regular

Criteria with both AND/OR logic

Example: Employees must work for GMS Company AND have an employee type of *Regular* OR they must work for ABC Company.

Worker Eligibility
Company = GMS Employee Type is Regular
Company = ABC

When eligibility criteria consist of more than 1 row, list more inclusive rules first to improve performance. Example: If employees must have a location of either the United States or Mexico and most employees are in the United States, list it first.

Time Off Plan Filters

You can enable a time off plan for different worker types as well as individual countries or country regions. Position-based time off plans evaluate the location associated with each of a worker's positions. Worker-based time off plans evaluate the location associated with the worker's primary position.

Time off plan filters don't consider period start dates or period end dates. You might need to define more specific eligibility rules to add to the plan.

A few examples of the effects of different combinations of time off plan filters and eligibility rules include:

Country/Country Region	Eligibility Rule	Eligible Workers
France	None	Workers located in France as of the period start date OR the period end date.
France	*Country Location as of Period End Date = France*	Workers located in France as of the period end date.
France	*Pay Rate Type as of Period End Date = Hourly*	Workers located in France as of the period end date OR workers located in France as of the period end date AND whose pay rate type is hourly.

Where to Add Eligibility Criteria

Define eligibility for a time off plan on the **Eligibility** tab of the **Create Time Off Plan** page.

Override the criteria defined for a plan using the **Time Off Plan Overrides** tab of the **Create Time Off** task or the **Create Accrual** task.

You can use the:

- **Evaluate Absence Eligibility** report to test whether a worker is eligible for a time off plan, time off, or accrual as of a date.
- **View Worker Time Off Eligibility by Organization** report to view absence eligibility details for active workers within the selected organizations as of the current day.

Related Information

Tasks

Steps: Create a Time Off on page 2104
Create Time Off Plans That Track Balances on page 2126
Create Time Off Plans That Don't Track Balances on page 2135
Create Accruals on page 2162

Examples

Example: Define Eligibility for a Time Off Plan on page 2192

Concept: Effective Dating for Absence

When creating a new time off plan, you must select an effective date to create a dated configuration snapshot. Additionally, when editing an existing accrual, time off, or time off plan, you’re prompted to edit an existing or create a new effective-dated snapshot. You can select from period start dates that derive from the period schedule of the Time Off plan.

Only fields in the tabbed sections of these tasks are effective-dated:

- **Create Time Off Plan**
- **Edit Accrual**
- **Edit Time Off**
- **Edit Time Off Plan**

The **Absence Configuration Snapshots** report enables you to compare configurations across snapshots for an absence setup object.

Example: Effective Dating a Time Off Plan

Your local government introduces eligibility for time off for the birth of a child or to care for a family member with serious illness. The update is effective January 1 of the next year. Enter 1/1/2019 as the effective date for your time off plan while using the **Edit Time Off Plan** task to make the necessary updates.

Example: Effective Dating a Time Off

Your company introduces a minimum time off validation per day, effective from the first day of March. Enter 1/3/2018 date as the effective date when using the **Edit Time Off** task to make the necessary updates.

Example: Effective Dating an Accrual

Your company increases the annual leave accrual amount, effective January 2019. Update the accrual calculation using the **Edit Accrual** task, effective 1/1/2019.

Example: Deleting an Effective-Dated Snapshot

In a Nonproduction environment, you create an absence set up object snapshot effective-dated August 1, 2020. You realize that the snapshot should be effective-dated June 30, 2020, but you can't change the date. You can delete individual snapshots, but only in Nonproduction environments.

Workday recommends that you thoroughly test your configuration in a Nonproduction environment before you move it to Production.

Access the **Absence Configuration Snapshots** report.

From the related actions menu of the snapshot you want to delete, select **Calculation** > **Delete**.

Use Object Transporter to migrate snapshots related to the absence configuration object you want to migrate. Object Transporter:

- Migrates all new snapshots.
- Migrates changes to existing snapshots.

- Overwrites the configuration for the existing snapshot in Production.

If you delete a snapshot in the Nonproduction environment before migrating the object, Object Transporter won't delete the corresponding snapshot in Production.

You can't use Object Transporter to change the effective date or delete an existing snapshot because it can cause unforeseen consequences and bad data.

Related Information
Tasks

Steps: Create a Time Off on page 2104

Create Accruals on page 2162

Steps: Set Up Time Off Plans on page 2102

Reference

The Next Level: Absence Effective Dating

Concept: Using Effective Dated Service Dates in Absence

Effective Dating in Service Dates enables you to define an effective date when making service date changes. To take advantage of this feature within time off calculations, we recommend that you review your calculations that reference service date fields and consider updating any that don't make reference to **Recent** *Service Date* **as of Period Start Date** or **Recent** *Service Date* **as of Period End Date**. You can use service date fields within accrual calculations and time off plan eligibility.

Using non-effective-dated service date fields can result in unexpected impacts for rehires or workers who had their service dates adjusted during their employment. When using service date fields in time off calculations within instance value calculations (IVCs) such as **Worker: Continuous Service Date**, the calculations return the latest top-of-stack service date change, regardless of the calculation being evaluated in a previous period that had an earlier service date value. The result of this behavior is that when modifying a service date value, the change takes effect across both future and historical periods. This is particularly problematic when a worker is rehired or acquired from another organization and their accrual history needs to reflect the service date history and not just the latest service date.

To address this behavior, Workday delivers alternative IVCs that accurately reflect the historical service date changes for a worker within time off and accruals. These IVCs evaluate the service dates as of the period start or period end date instead of returning the latest service date change. These IVCs have a naming convention of **Recent** *Service Date* **as of Period Start Date** or **Recent** *Service Date* **as of Period End Date**.

Review your current calculations that reference service date fields, paying particular attention to eligibility and accrual configuration. If you're unsure where you're referencing service dates in your configuration, you can use the **View Instance Value Calculation (Workday Owned)** report to view the IVCs and then check their usage to see where they're referenced.

Take note when you find references to service dates in your calculations and include them in your testing scenarios. Check whether the calculation uses the recommended IVC that evaluates the effective date of the service date field as of the period start date or period end date. Some commonly used service dates within Absence are:

Non-Effective Dated IVC	Recommended Effective Dated IVC
Worker Continuous Service Date	• **Recent Continuous Service Date based on Period Start Date** • **Recent Continuous Service Date Based on Period End Date**
Worker Hire Date	• **Recent Hire Date as of Period Start Date** • **Recent Hire Date as of Period End Date**

Non-Effective Dated IVC	Recommended Effective Dated IVC
Worker Seniority Date	• **Recent Seniority Date Based on Period Start Date** • **Recent Seniority Date Based on Period End Date**
Worker Time Off Service Date	• **Recent Time Off Service Date Based on Period Start Date** • **Recent Time Off Service Date Based on Period End Date**
Worker Union Seniority Date	• **Recent Union Seniority Date Based on Period Start Date** • **Recent Union Seniority Date Based on Period End Date**

If you're using calculations within Absence components in your tenant that don't reference the most recent service dates, validations in the **Tenant Analyzer** enable you to identify them. On the **Tenant Analyzer**, you can navigate to the *Calculations* row under the **Area** column of the **Absence** > **Validation** tab to view components that need your attention. Review the components in the **Instances Failing Validation** column to find out where you can replace existing calculations with instance value calculations that reference the most recent service date.

When making changes to calculations, it's important to consider the impact to any worker's time off balances. Consider effective date changes as well as a review of any balances persisted by the processes for calculating and recalculating balances. See:

- Concept: Guidelines for Storing Time Off Balances
- Recalculate Balances for Workers

Ensure that you test calculations that make reference to service dates when adopting the Effective Dating in Service Dates feature. In particular, consider these test scenarios:

- Rehired workers.
- Terminations.
- Workers with changes to their service dates, both retrospectively and future-dated.
- Midperiod hires.

When using the Effective Dating for Service Dates feature, you must enter an effective date when initiating a service date change. If you populate the effective date with the initiation date, you won't see a change in the behavior of your calculations that reference service dates.

Related Information

Tasks

Create Accruals on page 2162

Reference

2024R2 Feature Release Note: Effective Dating on Service Dates in Absence

The Next Level: Effective Dated Service Dates: Absence Implications

2023R2 What's New Post: Effective Dating for Service Dates

Reference: Tenant Analyzer on page 2062

Concept: Time Off in Workday Assistant

Note: You might need to take additional steps to enable this feature depending on your organization's subscription service agreement. For more information, see this Community article.

Workers can use Workday Assistant to request time off, view time off balances, correct time off, and view holiday schedules. You can disable time off capabilities on the **Edit Tenant Setup - Assistant** task.

Workers can:

- Enter time off for days in the past, present, and future.
- Add comments to time off requests by clicking **Edit or add details**.
- Correct and delete approved time off requests for future dates.
- Group time off requests in absence tables.

When workers:

- Request time off, Assistant recognizes date formats depending on users' preferred locales. Example: If an American worker enters 10/15/22 and a German worker enters 15.10.22, Workday Assistant interprets both time off requests correctly as October 15, 2022.
- View their time off balances, Assistant displays up to 20 balances and provides a link to the Absence Calendar when they've more than 20.

You can enable workers to request time off by adding the *Employee as Self* security group to these permissions in the Time Off and Leave functional area:

- Initiating action permissions on either the *Absence Calendar* or *Request Time Off* business process.
- **Request Time Off (REST Service)** permissions on the *Request Time Off* business process. You must configure this to enable workers to request time off in Assistant using either business process.

You can enable workers to correct time off by adding the relevant security group to the initiating action for the **Request Time Off (REST Service)** on the *Correct Time Off* business process security policy.

Workday Assistant doesn't support:

- Business process comments.
- Consecutive-day time off requests that spans multiple time off types.
- Time offs configured with **Start Time** and **End Time**.
- Time offs that workers can only enter through Time Tracking.

Related Information
Concepts

Setup Considerations: Workday Assistant on page 2713

Tasks

Steps: Set Up Time Off Plans on page 2102

Reference

Reference: Edit Tenant Setup - Assistant

Reference: Edit Tenant Setup - Assistant

Reference: Tips for Configuring Time Off Entry Validations

When you create time offs or absence tables, you can define validation rules to prevent users from entering invalid requests. This topic provides tips and guidelines for creating validations.

Use the same units in validation rules and time off plans.	Example: If the unit of time for a vacation plan is *day*, use 0.5 as the increment value for workers entering half-days.
Avoid conflicting rules.	Example: You can define a validation rule that requires workers to enter vacation time in increments of 4 hours. You can also define a separate set of rules defining the minimum *and* maximum vacation entry as 8 hours. The increment rule is unnecessary because the maximum and

minimum rules prevent vacation requests that are less than 8 hours.

Ensure that rules of the same type apply to different sets of time off types.

If you define validation rules of the same type, make sure that the rules apply to different sets of time off entries.

Example of conflicting rules:

- Maximum vacation entry = 8 hours (Time Off Entries to Include = *Individual Time Off Entry)*
- Maximum vacation entry = 12 hours (Time Off Entries to Include = *Individual Time Off Entry)*

Rules that don't conflict:

- Maximum vacation entry = 8 hours (Time Off Entries to Include = *Individual Time Off Entry)*
- Maximum vacation entry = 12 hours (Time Off Entries to Include = *All Time Off Entries for Worker (for Time Off Validation Set) for Same Date)* where the validation set includes vacation and floating holiday.

Apply maximum and multiple request rules consistently.

If you apply maximum or multiple request rules to a validation set, each time off must have the same limits and include the same time offs. Otherwise, the same combination of time off requests that is valid in 1 situation might not be valid in another.

Example: These rules exist for vacation and floating holidays:

Time Off	Maximum Request	Time Off Entries to Include	Time Off Validation Set
Vacation	8	All Time Off Entries for Worker (for Time Off Validation Set) for Same Date	• Vacation • Floating Holiday
Floating Holiday	8	All Time Off Entries for Worker (for Time Off Validation Set) for Same Date	• Floating Holiday

Workday applies a different maximum depending on the order of the time off entries:

	• Bob enters 8 floating holiday hours and later requests 8 vacation hours for the same day. Workday denies the second request because the vacation rule limits the sum of vacation and floating holiday hours to 8. • If Bob entered the vacation hours first, both requests would go through. Requests for floating holiday don't trigger the 8-hour maximum for combined vacation and floating holiday time. To apply these rules consistently, make the floating holiday rule identical to the vacation rule. Change the validation set to include both floating holiday and vacation.
Set a maximum for the sum of entries for the same time off and same day.	To apply a maximum time off limit to the sum of all time off entries for a time off (Example: To all vacation entries for a day): • Select *All Time Off Entries for Worker (for Time Off Validation Set) for Same Date* in the **Time Off Entries to Include** field. Don't select *Individual Time Off Entry*. If you do, the maximum applies to each time off request. • Include only vacation time off in the **Time Off Validation Set**.
Prevent multiple entries for the same time off and same day.	Select *All Time Off Entries for Worker (for Time Off Validation Set) for Same Date* in the **Time Off Entries to Include** field. Include only the selected time off in the **Time Off Validation Set**. The restriction applies even if you don't meet the maximum time off request. Example: If the maximum vacation request is 8 hours and workers enter 4 hours, they can't enter additional vacation requests for the same day.
Base maximum time off on work and holiday schedules using Workday-provided calculation rules.	This setting can be especially useful for workers with variable work schedules. Examples: • A worker is on the schedule to work 12 hours on a given day. The rule retrieves and enforces a time off maximum of 12 hours for that day. • A worker is on the schedule to work 8 hours and enters a request for 12. The rule enforces a limit of 8 hours. • A worker accidentally enters a request for 8 hours on a holiday. The rule enforces a limit of zero hours. This table lists delivered calculation rules and usage guidelines. To use a rule, select it in the **Value** field on the **Validations** tab of the **Create Time Off** page.

Calculation Rule Name	Time Off Plan Units	Required Calendars	Maximum Value Returned
Worker Holiday/ Work Schedule Calendars: Scheduled hours to work EXCLUDING holiday hours if positive, else 0 (no rounding)	Hours	Work Schedule Holiday	Greater of zero or the total number of scheduled work hours minus holiday hours.
Worker Work Schedule Calendar: Workday hours for date (based on As of Date) no rounding	Hours	Work Schedule	Number of scheduled work hours.
Worker Holiday Calendar: 0 if date is a holiday, else 8 You can copy the rule and change the maximum to any hourly value.	Hours	Holiday	Zero if the time off date is a holiday and 8 if the time off date isn't a holiday.
Worker Holiday Calendar: 0 if date is a holiday, else 24 You can copy the rule and change the	Hours	Holiday	Zero if the time off date is a holiday and 24 if the date isn't a holiday.

Calculation Rule Name	**Time Off Plan Units**	**Required Calendars**	**Maximum Value Returned**
maximum to any hourly value.			
Worker Work Schedule/ Holiday Calendars: 1 if workday hours MINUS holiday hours > 0, else 0	Days	Work Schedule Holiday	One if work hours > holiday hours and zero if work hours < holiday hours.
Work Schedule Calendar: 1 if date is a work day, else 0	Days	Work Schedule	One if the time off date is a work day and zero if the time off date isn't a work day.
Worker Holiday Calendar: 0 if date is a holiday, else 1	Days	Holiday	Zero if the time off date is a holiday and 1 if the time off date isn't a holiday.

Reference: Default Time Off Validation Messages

You can add validation rules for time off entries on the **Validation** tab of these tasks:

- **Create Absence Table**
- **Create Time Off**
- **Edit Absence Table**
- **Edit Time Off**

Before you consider adding custom text for the validation messages, review the default messages. When you include these **Data Entry Validation** fields in validation rules, Workday displays these validation messages for time off entries, where:

- *Value* corresponds to the **Value** that you specify on the rule together with the field that you select from the **Data Entry Validation** prompt.
- *Units* corresponds to the daily quantity unit of days or hours on the time off plan.

Data Entry Validation	**Time Off Entries to Include**	**Default Validation Message**
Consecutive Day Maximum	*Individual Time Off Entry*	Please update your request so that the number of consecutive days off is less than or equal to *Value*.
Consecutive Day Minimum	*Individual Time Off Entry*	Please update your request so that the number of consecutive days off is greater than or equal to *Value*.
Increments	*Individual Time Off Entry*	The Daily Quantity must be in increments of *Value Units*.
Maximum (position-based time off)	*All Time Off Entries for Position for Same Date* *All Time Off Entries for Position (for Time Off Validation Set) for Same Date*	The total Daily Quantity for *Worker - Position* cannot be more than *Value Units*. **Note:** When a previous time off exists for the same date, Workday appends this sentence to the message: A previous Time Off exists for this date.
(worker-based time off)	*All Time Off Entries for Worker for Same Date* *All Time Off Entries for Worker (for Time Off Validation Set) for Same Date*	The total Daily Quantity for *Worker* cannot be more than *Value Units*. **Note:** When a previous time off exists for the same date, Workday appends this sentence to the message: A previous Time Off exists for this date.
(individual time off)	*Individual Time Off Entry*	As of *Date*, the Daily Quantity cannot be more than *Value Units*.
Maximum Unpaid Time Off Units Allowed (absence table)	*Individual Time Off Entry*	You don't have a sufficient balance or aren't eligible to satisfy the request for *Absence Table* as of *Date*.
(time off)	*Individual Time Off Entry*	Unpaid time off is not allowed for *Time Off* . The Time Off request for *Date* exceeds the maximum amount of *Maximum Unpaid Time Off Units Allowed* unpaid *Units*.
Minimum	*Individual Time Off Entry*	The Daily Quantity cannot be less than *Value Units*.
Multiple Time Off Requests Not Allowed for Same Date	*All Time Off Entries for Position for Same Date*	*Time Off* for *Date* is not allowed. Another time off request exists for these dates. Multiple time off requests for the same position and/or date are not allowed.

Data Entry Validation	Time Off Entries to Include	Default Validation Message
	All Time Off Entries for Position (for Time Off Validation Set) for Same Date *All Time Off Entries for Worker for Same Date* *All Time Off Entries for Worker (for Time Off Validation Set) for Same Date*	
Time Off Date before Maximum Override Balance Date Not Allowed	*Individual Time Off Entry*	The Time Off date(s) is earlier than the override balance date of *Date* for *Time Off*.

Related Information
Tasks

Create Time Off Validations on page 2122

FAQ: Segmented Security for Time Off

Why can users view and request previously hidden time offs?

Unconstrained security groups aren't context-sensitive. When users are members of unconstrained security groups such as *Absence Administrator* or *Manager (Unconstrained)* in addition to *Employee as Self* and enter time off for themselves, they have both sets of permissions. They can view all of the time offs that they're eligible for.

To resolve this situation, remove the unconstrained security groups from your time off segment-based security groups. Use constrained versions of the security groups instead so that users see the appropriate time offs for each context.

Constrained groups are context-sensitive. When users are members of constrained security groups such as *Absence Partner* or *Manager* with access to specific time off security segments, they can only view the appropriate time offs when entering time off for another worker using these tasks:

- **Enter Time Off**
- **Enter Absence**

When members of the *Absence Partner* group enter time off for themselves, they use the *Employee as Self* context and can only view the appropriate time offs for Employee Self Service (ESS). However, if you've a time off segment for workers and another for the *Absence Partner* role, when absence partners support their own organization, they can request time off using time offs in both segments. To prevent this, ensure that a different absence partner supports those absence partners' organizations.

Why do users sometimes have view-only access to a time off request?	When users try to correct a time off that's secured by a time off segment that they don't have access to, Workday provides view only access to the time off request and displays a message explaining why they can't correct it.

Related Information
Tasks

Steps: Set Up Segmented Security for Time Off on page 2108

Reference

The Next Level: Preparing for Time Off Segmented Security (Guide)

FAQ: When do workers see the Maximum Unpaid Validation?

Workday triggers the Maximum Unpaid validation when a worker requests time off that both:

- Reduces their balance to below the **Lower Limit** value defined in the time off plan, or any time off overrides.
- Exceeds the number of unpaid units defined in the time off plan for **Maximum Unpaid Time Off Units**.

Example: You set **Lower Limit** to zero and **Maximum Unpaid Time Off Units** to zero. If a worker requests a time off that makes their balance go below zero, Workday triggers the validation.

Example: You set **Lower Limit** to zero and **Maximum Unpaid Time Off Units** to 8. If a worker requests a time off that makes their balance go below -8, Workday triggers the validation.

Related Information
Concepts

Concept: Accrual and Time Off Limits on page 2176

FAQ: How do I delete or inactivate a time off plan?

You can't delete a time off plan. You can, however, prevent users from requesting time off and stop displaying plan balances. A simple way to do this is to add an eligibility rule that no one can meet. You can use a value comparison calculation to create a condition that is never true, such as *1=2*, and add it to the eligibility rules. On the **Edit Time Off Plan** task:

- Check the **Accrual** and **Time Off** tabs for overrides to eligibility rules. If any accrual or time off definitions override the plan eligibility rules, be sure to modify the **Worker Eligibility** rules on those definitions to include the *1=2* condition.
- If workers can satisfy eligibility rules by meeting either set (row) of criteria, add the *1=2* condition inside each row.

Example: The worker eligibility rules in your time off plan, or time off plan overrides in the accrual or time off, include these rows of value comparison calculations. Together, these rules require workers to be full-time or work over 30 hours.

- First row:

Field	Value
Name	*Full-time Employees*
Category	*Absence* and *Payroll*
1st Operand	*Worker: Scheduled Weekly Hours (across all jobs) as of Sub Period End Date*
Operator	*greater than or equal to*
2nd Operand	*40*

- Second row:

Field	Value
Name	*Part-time over 30 hours*
Category	*Absence* and *Payroll*
1st Operand	*Worker: Scheduled Weekly Hours (across all jobs) as of Sub Period End Date*
Operator	*greater than or equal to*
2nd Operand	*30*

To add the *1=2* condition inside each row:

1. Access the **Edit Time Off Plan** task and select the time off plan that you want to inactivate.
2. On each row of the **Worker Eligibility** grid, select **Create** > **Create Value Comparison Calculation**.
3. Enter or select these values:

Field	Value
Name	*1=2*
Category	*Absence* and *Payroll*
1st Operand	*1*
Operator	*equal to*
2nd Operand	*2*

Related Information
Concepts

Concept: Eligibility for Time Off Plans, Time Off, and Accruals on page 2142

Set Up Accruals, Period Schedules, and Balances

Setup Considerations: Period Schedules

You can use this topic to help make decisions when planning your configuration and use of period schedules. It explains:

- Why to set them up.
- How they fit into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What They Are

A period schedule is a set of sequential periods of a standard length that Workday uses in:

- Workday Absence to determine accrual frequency for time off plans that track balances, and to define worker eligibility for a time off plan.
- Workday Payroll to determine how often you pay workers and the span of days that the payment is for. They also control forward accruals for accounting entries.
- Workday Time Tracking to control when users can enter and adjust work hours.

Business Benefits

You can set up multiple period schedules with different frequencies according to your business needs.

You can save time and improve efficiency by using:

- An EIB integration to create a period schedule, or to add periods to an existing schedule.
- The same period schedules for multiple Workday products.

Workday increases flexibility by enabling you to automatically adjust payment dates that normally fall on a weekend.

Use Cases

- Define the length and payment dates for different payroll cycles. Example: Set up a biweekly schedule for regular payroll, and an annual schedule for bonus payments.
- Set up matching time period and pay period dates to pay employees for time worked on the same dates covered by the pay period.
- Establish when workers can enter time worked, and when administrators can make adjustments to workers' hours, for each period.
- Define payroll cutoff dates to exclude one-time payments after a certain date each period.
- Integrate holiday calendars to automatically adjust pay dates and accommodate non-business days.

Questions to Consider

Questions	Considerations
How many different cycles for payroll, time tracking, and absence exist in your company?	You need to create at least 1 schedule for every pay and time tracking cycle. You can share schedules in Absence, Time Tracking, and Payroll when the time period and the pay period dates align. When they don't, create separate period schedules for each product and map each period to pay periods. In payroll, pay groups with the same pay cycle and pay dates can share a schedule. Example: Pay groups for hourly and contingent workers can share a biweekly period schedule.
Do you use Workday Payroll in more than 1 country?	You can use a period schedule for multiple countries. When needed, you can set a different payment date on a period for each country. Specify the date override before you make any payments for the period.
Do you track balances in your time off plans?	If your time off plan tracks balances, you can create a period schedule that matches the frequency that your workers accrue time off. Example: Workers accrue 2 time off days per month.
When do you want workers to enter their time for a period?	You can set dates for each period between which workers can enter time for the period.
How do you want your workers to accrue time off?	You can configure your period schedule so that your workers accrue their time off at: • The start or end of a period. • A customized frequency.

Questions	Considerations
	You can also front-load accruals. Example: Workers accrue 5 sick days at the start of the year.
Does your company have a holiday calendar?	You can integrate your company's holiday calendar to automatically adjust pay dates and accommodate non-business days.

Recommendations

To save time and reduce duplication of effort, review the period schedules in your tenant before you create a new schedule. You might be able to reuse a schedule with the same frequency.

Altering the start and end dates for a payroll schedule can impact retro, proration, and FLSA pay calculations. Instead of changing the dates for a period, create a new pay group and move workers to the new pay group on the date the change occurs.

When you create period schedules for Time Tracking:

- Lock time entry when you need to calculate payroll.
- Close time entry no more than 3 months after the period end date.
- Define Absence and Time Tracking eligibility criteria that match the guidelines you use to assign employees to pay groups.

When building a schedule, add periods for the current and next year. Doing so enables workers to request time off for dates into the future. For optimal performance, Workday recommends you build period schedules no more than 2 years in the future from the current period. For customers using commitments, you can configure period schedules beyond 2 years.

Requirements

You need at least 1 period in each schedule with dates before the effective date of your first Workday Payroll or HCM transactions.

When you create a semimonthly period schedule, the first period of each month must end on the 15th to ensure accurate time tracking processing.

Limitations

Workday doesn't automatically adjust payment dates that fall on a statutory holiday.

You can't change the payment date or your accrual configuration for a period after you've calculated payroll for that period. Cancel the pay calculation, make the changes to the period schedule, then rerun the pay calculation.

Workday doesn't support using calculations that reference academic pay periods or disbursement plan periods in Absence calculation fields as they don't use Absence period schedules. See:

- Reference: Balance Calendars
- Set Up Academic Pay Period Calendar

When you generate period schedule periods to extend an existing schedule, you:

- Can only add periods for weekly, biweekly, semimonthly, monthly, and annual schedules.
- Can only add periods to period schedules that have less than 2 years of future periods already added.
- Need to edit the schedule to update the time tracking, payroll GL accruals, and payroll settlement date overrides information for generated periods.

Tenant Setup

No impact.

Security

Domains	**Considerations**
• *Set Up: Payroll (Pay Group Specific)* in the Core Payroll functional area. • *Set Up: Payroll Interface* in the Payroll Interface functional area.	Enable you to create and manage period schedules for payroll.
Set Up: Period Schedule in the Project Tracking functional area.	Enables you to create and manage period schedules for projects.
Set Up: Time Off (Calculations - Absence Specific in the Time Off and Leave functional area.	Enables you to create and manage period schedules for time off plans.
Set Up: Time Tracking in the Time Tracking and Time Tracking Hub functional areas.	Enables you to create and manage period schedules for time tracking.

Business Processes

No impact.

Reporting

Reports	**Considerations**
Audit - Workers with Multiple Time Period Schedules	Enables you to identify workers who meet eligibility requirements for more than 1 Time Tracking period schedule.
Tenant Analyzer	Enables you to verify your period schedule setup against Workday recommendations.
View Period Schedule	After adding periods to a schedule, enables you to verify that dates are correct for all new periods.

Integrations

Integrations or Web Services	**Considerations**
Get Period Schedule	Retrieves period schedule information.
Put Period Schedule	Uploads a new period schedule or adds periods to an existing schedule.

Connections and Touchpoints

Features	**Considerations**
Continuous payroll calculation	You can set up a period schedule that enables you to automatically: • Run a full calculation to open each period. • Stop continuous calculations so you can complete final audits.
Pay groups	When you create a pay group, you select the period schedule that Workday uses for each run category.

Features	Considerations
Payroll accounting	Workday creates forward accruals when a pay period spans multiple accounting reporting periods.
Payroll calculation	Workday calculates payroll results for a specified pay period. For each pay group, complete payroll for a period before you calculate payroll for the next period.
Payslips	A payslip displays pay for the time period you define.
Time off plans	You can run Absence Management reports based on the period schedules. Workday uses the period schedule to: • Define worker eligibility for time off plans. • Determine the frequency of accruals for time off plans that track balances.

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information
Tasks

Set Up Period Schedules for Time Tracking on page 2596

Set Up Payroll and Time Tracking Period Schedules

Create Period Schedules for Time Off

Create or Edit Period Schedule for Payroll Interface

Create Period Schedules for Time Off

Prerequisites

Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area.

Context

Time off plans that track balances use a period schedule to determine:

- The frequency of accruals.
- The start and end dates of the periods that retrieve and process time off.

Period schedules don't control custom accrual frequency for time off plans.

You can use period schedules when defining eligibility rules for a time off plan, whether or not the plan tracks balances. Example: You might define an eligibility rule requiring workers to be full-time *as of the current period start date*.

You can also import period schedules from a spreadsheet using Workday's Enterprise Interface Builder (EIB).

Note: Workers can't request time off for dates outside a time off plan period schedule. When building a schedule, consider adding periods for the current and next year. Ensure that you have at least one period in your period schedule with dates before the effective date of your first Workday Payroll or HR transactions.

Steps

1. Access the **Create Period Schedule** task.
2. Select the period **Frequency**.
3. Select a **Usage** of *Absence*.
4. Enter the **Period Start Date** and the **Period End Date** for each period.

Next Steps

- Assign the period schedule to one or more time off plans.
- Add periods to the schedule, as needed, so that workers can continue to request time off for future dates.

Related Information
Tasks

Steps: Set Up Time Off Plans on page 2102

Create Balance Periods

Prerequisites

- Review the **All Balance Periods** report to determine if Workday delivers the balance period you need. Review the *Payroll* and *Absence* categories.
- Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area.

Context

A balance period defines the start and end dates of a time off plan that tracks balances. The balance period (typically a year) tells Workday over what period to accumulate accrual, time off, and time off plan balances. At the end of the balance period, Workday resets balances to zero and carries over the plan balance up to the set limit.

Workday provides most of the balance periods you need for time off plans.

Steps

1. Access the **Create Balance Period** task.
2. From the **Category** prompt, select *Absence*.

   To make the balance period available for Payroll use too, select *Payroll*.
3. In the **Balance Period Detail** grid, select a **Start Date Calculation** and **End Date Calculation**.

   You can select Workday-provided date calculations for the start and end dates or use the date creation tasks.
4. For the **Period Date Indicator**, specify the plan year to use for processing time off entries and accruals when an Absence processing period crosses plan years:

   - *Based on Period End Date:* Process in the plan year that includes the end date (the new plan year). Use this setting when the time off plan has a carryover date set to the balance period start date.
   - *Based on Period Start Date:* Process in the plan year that includes the period start date (the old plan year). Example: Use this setting when front loading accruals for your workers when the first date of your balance period isn't the first workday of the period.

Example

The Vacation time off plan is based on a fiscal year of July 1 to June 30 and uses a weekly period schedule. Time off taken during the last week of the year (June 26 to July 2) processes in the old plan year.

To define the balance period, create these 2 date calculations that return:

- July 1 of the current year.
- June 30 of the next year.

To define the balance period, configure these settings:

- **Start Date Calculation**: Select the date calculation that returns July 1 of the current year.
- **End Date Calculation**: Select the date calculation that returns June 30 of the next year.
- **Period Date Indicator**: Select *Based on Period Start Date*.

Related Information

Tasks

Steps: Set Up Time Off Plans on page 2102

Create Calculations

Reference

Reference: Date Calculations

Create Accruals

Prerequisites

Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area.

Context

Define accruals for use in time off plans that track balances. An accrual specifies the accrual amount, when workers receive accruals, and other rules. If an accrual has eligibility requirements, a frequency, or limits that differ from the time off plan, you can define requirements specific to the accrual.

When an accrual is associated with a position-based time off plan, limits are based on position. While it's typical to base the accrual calculation and eligibility rules on position, you can instead define rules that reference a worker's primary position or all positions.

Steps

1. Access the **Create Accrual** task.
2. Name the accrual and enter an identifying code for web services.
3. (Optional) Set up the accrual from which workers can buy time off:
   a) Select the **Allow to Buy Time Off** check box.

      Note: You can't edit this check box after the accrual is created. You can either set up an accrual for buying or as a regular accrual.

   b) Enter a value in the **Buy Time Off Display Name** field.

      Workday displays the value in the **Type of Time Off** prompt on the **Buy Time Off** task. If the field is blank, Workday displays the **Accrual Name**. We recommend you enter the same value as the time off that users see when they request time off.
4. Define the accrual **Calculation**.

   As you complete the task, consider:

Option	Description
Calculation	Select the calculation that returns the number of hours or days workers receive with each accrual. You can select: • A constant value. Example: 12 hours or 0.5 days.

Option	Description
	• A calculation based on a service rate table. • Any other type of calculation. When you use the accrual in a day-based plan, specify a daily unit of time, such as 0.5 (days), not 4 (hours). When you use the accrual in an hourly plan, enter an hourly unit of time, such as 4 (hours), not 0.5 (days). Workday doesn't automatically convert hours to days or days to hours. When you use the accrual for buying, by selecting the **Allow to Buy Time Off** check box, the calculation is automatically set to *0*, and the field is not editable. An accrual configured for buying won't add to the time off plan balance unless the worker buys time off against it.
Priority	Set a priority for processing the accrual. Enter a unique value. Accrual priorities determine their processing order, which is particularly important if they occur on the same date and contribute to the same time off plan. Example: *Vacation* has a priority of 1 and *Sick Time* has a priority of 10. If both accruals occur on the period end date, Workday adds the *Vacation* accrual to the balance first.
Adjustments/Overrides Allowed	Enable adjustments and overrides for workers' absence accruals. If the accrual has a different **Accrual Frequency Method** value than the time off plan, then add an override on the **Time Off Plan Overrides** tab.
Options	Specify an accrual type: • *Front-Loaded*: Workers receive front-loaded accruals up front, at the beginning of the balance period, rather than in increments throughout the balance period. You can't use front-loaded accruals with position-based time off plans. To ensure that front-loaded accruals accrue in the first period of the balance period, use either of these scheduling options: • Add 1 of these scheduling rules to the accrual: • *Scheduling: Front-Loaded* • *Scheduling: Annual - 1st Period of year (based on Period End Date) or Mid-Period Hire or Termination* • Add the accrual to a time off plan with a year-to-date (YTD) period schedule

Option	Description
	and accrual frequency method of *Start of Period*. If you use this option, you don't need to add scheduling rules to the accrual. • *Based on As of Date*: Workers can receive accruals at the start of or end of the period schedule. The accrual value can change during the period if a worker gains or loses eligibility to the accrual itself or calculations within the accrual resolve differently. Workday prorates the accrual based on the As Of date of the change. You can't use Based on As of Date accruals with position-based time off plans. Scheduling is optional for this accrual type if you add an *Automated Accrual Adjustment* Service step after the *Completion* step to the *Change Job* business process. For **Accrual Frequency Method**, select *Start of Period* or *End of Period*. • *None*: The accrual doesn't have any special proration behavior and operates according to the start or end date of the period. You can't change the *Front-Loaded* or *Based on As Of Date* options after the accrual is in use. However, you can change from *None* to either of these options if there are no adjustments or overrides for the accrual on the **Maintain Accrual and Time Off Adjustments/Overrides** task. When you use the accrual for buying, by selecting the **Allow to Buy Time Off** check box, the **Options** field is automatically set to *None*, and the field is not editable.
Rounding	Select a rounding definition to apply to front-loaded or as-of-date accrual calculations. Workday applies the rounding as part of the *Automated Accrual Adjustment* service step on the *Change Job* business process. Example: *Round to nearest 0.1*. Selecting a rounding definition can eliminate the need to further adjust the accrual results.

5. If you use Workday Time Tracking, select **Time Calculation Tags** for the accrual calculation to reference. If you select:

- More than 1 tag in a row, all time blocks must have the tags to be in this calculation.
- Tags in separate rows, all time blocks must have tags in at least 1 row to be in this calculation.

6. Select the **Scheduling** rule that determines when workers receive the accrual.

   Example: You might select a rule that makes floating holiday hours accrue only in the first month of the year.

   You can combine multiple scheduling rules in the same row or insert a separate row for each rule. A worker must meet all criteria specified in the same row. If you define criteria in separate rows, a worker must satisfy the criteria in at least 1 row. Based-on-as-of-date accruals don't need a scheduling rule.
7. (Options) On the **Time Off Plan Overrides** tab, complete the **Accrual Frequency Override** section if this accrual frequency differs from the accrual frequency of the time off plan. As you complete this task, consider:

Option	Description
Accrual Frequency Method	Specifies when to add the accrual to a worker's plan balance. Select 1 of these options: • *Start of Period*: before subtracting time off. Workers might reach upper limits sooner and lower limits later than if Workday processes the accruals after the time off. • *End of Period*: after subtracting time off. • *Custom Frequency*: based on the date calculation you define in the next 4 fields. When you use the accrual for buying, by selecting the **Allow to Buy Time Off** check box, you must select either *Start of Period* or *End of Period*.
First Accrual Date	Applies to accruals with a custom frequency. Select the calculation that returns the first date of the accrual, such as *Worker: Hire Date* or *Worker: Time Off Service Date*, or create your own date calculation to return this date. Examples: • Create a date increment/decrement calculation that returns a worker's hire date plus 30 days. (The hire date falls on the 31st day of the month and the next month has fewer than 30 days. The accrual occurs on the last day of the month.) • Pause an accrual if a worker has an approved time off either on their hire anniversary date or a number of days before or after the date. Use the **Number of Days to Pause an Accrual** to specify both the number of days either side of their anniversary and the days to pause the accrual. • Delay annual time off accruals to the next available working day for workers who are absent on the day of their annual accrual and the day before. Select the *Accrual Date Paused if Worker is Absent* instance value calculation (IVC). If you select this IVC, don't enter accrual recurs values in the next 2 fields.

Option	Description
	Workers must still meet scheduling criteria for the accrual to occur on this date.
Accrual Recurs Every	Applies to accruals with a custom frequency. Enter the number of recurring units of time (days or months) after the first accrual date when the accrual is to occur. Example: Enter *1* if the accrual is to occur every month on the anniversary of the first accrual date.
Accrual Recurs Unit of Time	Applies to accruals with a custom frequency. Specify if the recurrence interval represents *Days* or *Months*.
Number of Days to Pause an Accrual	Applies to accruals with a custom frequency. Only available when **First Accrual Date** is *Pause Accrual for Related Time Off Events*. Enter the number of days to pause the accrual if a worker is absent for a defined period before or after their seniority anniversary occurs.

8. Complete the **Worker Eligibility Override** section if the eligibility criteria for this accrual differs from the worker eligibility criteria defined for the time off plan.

   The eligibility rules on this tab override rules defined at the time off plan level. If you don't define rules here, the accrual automatically inherits the rules associated with the time off plan.

   When adding rules on this tab, consider that:

   - You need to add the same eligibility rules that are already configured on the time off plan (if any), and any additional rules that make the eligibility for the accrual unique.
   - All workers are eligible for the accrual if there are no eligibility criteria on the plan or the accrual.
   - Workers must satisfy all criteria specified in the same row.
   - If you define criteria in separate rows, workers must satisfy the criteria in at least 1 row.
9. Use the **Limit Override** fields to define an upper accrual limit if different from the upper limit defined for the plan.

   Workday automatically reduces the accrual for any calculation period by the balance amount that exceeds the limit and displays the forfeited accrual on Workday pages and reports.

   In addition to accrual limits, these parameters can impact worker accruals:

   - The accrual processing order (defined by the accrual priority).
   - The timing of accrual processing (defined by the time off plan).

Option	Description
Value	Select the calculation rule that returns the maximum number of days or hours workers can accumulate in the time off plan balance. When a worker buys time off, the value is the limit that the time off balance shouldn't exceed.
Based On	Select the time off plan that includes the accrual. Workday displays the plan balance period.

Option	Description
	Exception: If defining an accrual for an accrue-as-you-go plan, select the accrual itself.

10. Configure the **Expiration Override** section so that time off can expire relative to the date that it was accrued.

    You can also configure expiration on accruals for time off plans with carry over limits and expiration, however, expiring accruals will be exempt from these carry over rules.

    As you complete this task, consider:

Option	Description
Amount of Time Before Expiration	Select a constant value or a calculation for the number of days or months after the accrual date that accrual units expire. Note: Once saved, this field may be required and cannot be removed.
Unit of Time Before Expiration	Select Days or Months as the unit of time for measuring the expiration date. Note: Once saved, this field may be required and cannot be removed.
Include Prior Balance Period Accruals in Upper Limit Calculation	Select if expiring accrual should be included in time off plan balance upper limit calculations across balance periods.

Note: You may not be able to remove expiration from an accrual once saved. Before saving, review Concept: Accrual Expiration on page 2179.

11. (Optional) On the **Buy Options** tab, define the options for workers to buy time off.

    As you complete this task, consider:

Option	Description
Available to Buy During	Select when workers can buy time off: • *Anytime*. Workers can buy time off any time during the balance period. From the **Balance Updated in Period** prompt, select when the balance is updated: • *Current Period*. The balance is updated in the same period when the worker buys time off. • *Next Period*. The balance is updated in the next period after worker buys time off. The start and end payroll adjustment dates are automatically calculated based on the buy event. Workday sets the start payroll adjustments date to the most recent of these 2 dates: the date when the buy event is submitted or the date when the time off balance is updated. The end date for payroll

Option	Description
	adjustments is set to 1 year after the start date for payroll adjustments. • *Fixed Period*. Workers can buy time off based on a buy schedule. You must select a schedule for buying time off from the **Buy Schedule** prompt. Buy schedules are only available for workers to select if they have the same period schedule as the time off plan that the accrual is linked to.
Maximum Limit to Buy	Select a calculation to define the limit of time offs that a worker can buy. From the **Maximum Limit Applies to** prompt, consider whether you want workers to buy time off at any time or multiple times throughout the year based on the buy schedule: • *Period in which balance is updated*. Workers can buy up to the maximum limit for each period that the balance is updated. • *Balance Period*. Workers can buy up to the maximum limit for the entire balance period.
Allowable Increments to Buy	Select a calculation to define the increments or multiples of time offs that workers can buy.
Pay Rate for Adjustments	Select the pay rate to be used for the payroll adjustments: • *At the start of first pay adjustment*. Workday uses the worker's pay rate at the start of the first pay adjustment period for all pay periods. This is fixed. • *Current rate during each pay period*. Workday uses the worker's pay rate for each pay period. This could vary if the worker's pay rate changes in a pay period. • *When time off was purchased*. Workday uses the worker's pay rate at the time when they purchased time off for all pay periods. This is fixed.

Example

Limiting Sick Time Accrual to 40 Hours

The Paid Time Off plan, which includes accruals for *Vacation* and *Sick Time*, has an upper accrual limit of 120 hours. You want to limit sick time accrual to 40.

On the **Time Off Plan Overrides** tab, specify:

- **Value**: *40 hours*
- **Based On**: *Paid Time Off*

When calculating a worker's accrual for *Sick Time*, Workday compares the worker's plan balance to the 40-hour limit. If the plan balance exceeds 40 hours, it reduces the accrual by the number of hours over the limit.

Overriding the Accrual Frequency Method

According to the time off policy of your organization, workers accrue 12 hours of paid time off on:

- The hire date.
- Each monthly anniversary of the hire date for the first calendar year of employment.

After that, they receive their entire accrual at the start of the year. You are in the process of setting up the Paid Time Off plan. It has an **Accrual Frequency Method** of *Start of Period*. The plan has 2 accruals:

- *Paid Time Off Accrual - After First Calendar Year of Employment*

  Because this accrual has the same frequency as the plan, no **Accrual Frequency Override** instructions are necessary.
- *Paid Time Off Accrual - First Calendar Year of Employment*

  This accrual occurs at a different frequency from the plan, so you enter these instructions for the **Accrual Frequency Override:**

  - **Accrual Frequency Method**: *Custom*
  - **First Accrual Date**: *Worker: Hire Date*
  - **Accrual Recurs Every**: *1*
  - **Accrual Recurs Unit of Time**: *Months*

Next Steps

- Add accruals to time off plans.
- Determine which time off plan an accrual is associated with by checking the **Usage** tab for the accrual.
- Access these reports to verify that you configured accruals correctly:
  - **Calculation Exception Audit**
  - **Evaluate Absence Calculation**

Related Information

Concepts

Concept: Buy Time Off on page 2241

Concept: Eligibility for Time Off Plans, Time Off, and Accruals on page 2142

Concept: Accrual Expiration on page 2179

Tasks

Steps: Set Up Time Off Plans on page 2102

Evaluate Absence Calculations on page 2423

Reference

The Next Level: The Calculation Engine Behind Absence Management

FAQ: Pause Annual Time Off Accruals for Absent Workers on page 2182

2023R1 What's New Post: Rounding on Automated Accrual Adjustments
2024R2 Feature Release Note: Buy Time Off

Examples

Example: Configure Accruals Relative to Hire Date and Years of Service on page 2206
Example: Create an Accrue-As-You-Go Bereavement Plan on page 2198

Create Front-Loaded Accruals

Prerequisites

Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in Time Off and Leave functional area.

Context

Create front-loaded accruals to use in worker-based time off plans that track balances. Workers receive front-loaded accruals all at once at the beginning of a year rather than in increments over time.

Schedule front-loaded accruals to occur in the beginning of a year, by either:

- Adding the front-loaded accrual to a time off plan that accrues at the start of the first period of the year.
- Configuring scheduling criteria on the accrual itself.

Steps

1. Access the **Create Accrual** task.
2. Name the accrual and enter an identifying code for web services.
3. From the **Calculation** prompt, select the calculation that returns the number of hours or days workers receive at the beginning of the balance period.

   You can select a constant value, such as 12 hours or 0.5 days, or any other type of calculation.

   Note: If you're using the accrual in a day-based plan, specify a daily unit of time, such as 0.5 (days), not 4 (hours). If you're using the accrual in an hourly plan, enter an hourly unit of time, such as 4 (hours), not 0.5 (days). Workday doesn't automatically convert hours to days or days to hours.

   You can't apply front-loaded accruals to workers hired mid-balance period.
4. In the **Priority** field, assign a priority for processing the accrual when other accruals occur on the same date and contribute to the same time off plan.
   Example: *Vacation* has a priority of 1 and *Sick Time* has a priority of 10. Both accruals occur on the period end date. Workday adds the *Vacation* accrual to the balance first.
5. Select the **Adjustments/Overrides Allowed** check box.
6. Select the *Front-Loaded* option.
7. (Optional) Select a **Rounding** definition to apply to the accrual calculation.

   Workday applies rounding as part of the *Automated Accrual Adjustment* service step on the *Change Job* business process. Example: *Round to nearest 0.1*.
8. If you're using Workday Time Tracking, select **Time Calculation Tags** for the accrual calculation to reference. If you select:

   - More than 1 tag in a row, all time blocks must have all tags included in this calculation.
   - Tags in separate rows, all time blocks must have tags in at least 1 row in this calculation.

   Time calculation tags assist in calculating accruals for compensatory time off.
9. In the **Scheduling** grid, select *Scheduling: Front-Loaded*.

   Alternatively, you can select *Scheduling: Annual - 1st Period of Year (based on Period End Date) or Mid-Period Hire or Termination*, which takes into account midperiod hires and terminations.

   You might not need to add scheduling criteria if you add the front-loaded accrual to a time off plan with an annual period schedule.

10. In the **Accrual Frequency Method** field on the **Time Off Plan Overrides** tab, select *Start of Period*.

    You can avoid setting up a time off plan override for the accrual frequency method. Add the accrual to a time off plan with an accrual frequency method of *Start of Period*.

11. Complete the **Worker Eligibility Override** section if the eligibility criteria for this accrual differ from the worker eligibility criteria defined for the time off plan.

    You can't use front-loaded accruals with time-defined lower limits, calculations, or eligibility criteria. Example: Eligibility for a new accrual rate based on length of service.

12. Use the **Limit Override** fields to define an upper accrual limit if different from the upper limit defined for the plan.

    Workday automatically reduces the accrual for any calculation period by the balance amount that exceeds the limit and displays the forfeited accrual on Workday pages and reports.

    In addition to accrual limits, these parameters can impact worker accruals:

    - The accrual processing order (defined by the accrual priority).
    - The timing of accrual processing (defined by the time off plan).

    As you complete this task, consider:

Option	Description
Value	Select the calculation rule that returns the maximum number of days or hours workers can accumulate in the time off plan balance.
Based On	Select the time off plan that includes the accrual. Workday displays the plan balance period. Exception: If defining an accrual for an accrue-as-you-go plan, select the accrual itself.

Next Steps

Add the accrual to a time off plan that has a year-based balance period.

Related Information

Tasks

Steps: Prorate Front-Loaded Balances on page 2307

Create Accruals on page 2162

Steps: Set Up Time Off Plans on page 2102

Reference

2023R1 What's New Post: Rounding on Automated Accrual Adjustments

Create Based-on-As-of-Date Accruals

Prerequisites

Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in Time Off and Leave functional area.

Context

Create accruals that use an as-of date to automate accruals adjustments. Accrual values can change during the period if a worker gains or loses eligibility to the accrual itself or calculations within the accrual resolve differently. Workday prorates the accrual based on the As Of date of the change. When you initiate the *Change Job* business process, this accrual automatically calculates the accrual proration, to the day, based on the effective date of change. You can use the based-on-as-of-date type of accrual in time off plans that track balances.

You can configure accruals that are based on an as-of date by adding:

- The accrual to a time off plan that accrues at the *Start of Period* or *End of Period*.
- A time off plan override to the accrual with an **Accrual Frequency Method** of *Start of Period* or *End of Period*.

Steps

1. Access the **Create Accrual** task.
2. Name the accrual and enter an identifying code for web services.
3. From the **Calculation** prompt, select the calculation that returns the number of hours or days workers receive at the beginning or end of the period schedule.

   You can select either a constant value, a conditional calculation, or any other type of calculation. Example: Select a conditional calculation where the accrual equals 12 hours for a full-time worker or 6 hours for a part-time worker.

   Note: If you're using the accrual in a day-based plan, specify a daily unit of time, such as 0.5 (days), not 4 (hours). If you're using the accrual in an hourly plan, enter an hourly unit of time, such as 4 (hours), not 0.5 (days). Workday doesn't automatically convert hours to days or days to hours.
4. In the **Priority** field, assign a priority for processing the accrual when other accruals occur on the same date and contribute to the same time off plan.
   In Global Management Services, *Vacation* has a priority of 1 and *Sick Time* has a priority of 10. If both accruals occur on the period end date, Workday adds the *Vacation* accrual to the balance first.
5. Select the **Adjustments/Overrides Allowed** check box.
6. Select the *Based on As of Date* option.
7. (Optional) Select a **Rounding** definition to apply to the accrual calculation.

   Workday applies rounding as part of the *Automated Accrual Adjustment* service step on the *Change Job* business process. Example: *Round to nearest 0.1*.
8. In the **Accrual Frequency Method** field on the **Time Off Plan Overrides** tab, select either *Start of Period* or *End of Period*.

   You can avoid setting up a time off plan override for the accrual frequency method. Add the accrual to a time off plan with an accrual frequency method of *Start of Period* or *End of Period*.
9. Complete the **Worker Eligibility Override** section if the eligibility criteria for this accrual differ from the worker eligibility criteria defined for the time off plan.
10. Use the **Limit Override** fields to define an upper accrual limit if different from the upper limit defined for the plan.

    Workday automatically reduces the accrual for any calculation period by the balance amount that exceeds the limit and displays the forfeited accrual on Workday pages and reports.

    In addition to accrual limits, these parameters can impact worker accruals:

    - The accrual processing order (defined by the accrual priority).
    - The timing of accrual processing (defined by the time off plan).

    As you complete this task, consider:

Option	Description
Value	Select the calculation rule that returns the maximum number of days or hours workers can accumulate in the time off plan balance.
Based On	Select the time off plan that includes the accrual. Workday displays the plan balance period.

Option	Description
	Exception: If defining an accrual for an accrue-as-you-go plan, select the accrual itself.

Related Information

Tasks

Steps: Prorate Based-On-As-Of-Date Balances on page 2309

Reference

2023R1 What's New Post: Rounding on Automated Accrual Adjustments

Create Rolling Period Accruals

Prerequisites

- Create a time off plan that:
  - Enables balance overrides.
  - Specifies a time off in the **Time Off for Termination Adjustment** field.

    Note: Linking a termination adjustment ensures that Workday zeros out an employee's balance and recoups or pays out used or unused time on the employee's termination. When you don't link a termination adjustment, if you rehire workers in the same balance period, they can have higher than expected balances. This is because their remaining balance from their prior employment combines with the entitlement for their most recent employment period. For this reason, the tenant analyzer and our deployment recommendation is always to include termination adjustments on any time off plan that tracks a balance, even if you don't need to map the remaining balance to payroll for payout.
- Security: *Set Up: Time Off (Calculations - Generic)* domain in the Time Off and Leave functional area.

Context

You can apply rollback logic to accruals, with definable conditions, that accurately calculates absence balances that don't typically have a start or end date. The rolling period starts on the current day and looks back to the beginning of the defined rollback period. Historic time off requests taken by workers expire after they fall outside of the rollback period. Workday restores them to the time off plan balance. Example: You can configure sick plans with a rolling period of 12 months that begins with the first day of the absence.

For this task, you create 2 accruals:

- The initial accrual that defines the amount of the accrual. Example: Employees receive 10 days.
- The rolling period accrual that specifies how far back to look for expired absences.

Steps

1. Access the **Edit Time Off Plan** task.
2. On the **Accrual** tab, add a row to create the initial accrual.
3. As you complete the **Create Accrual** task, consider:

Option	Description
Calculation	The amount of the accrual. Example: 10.
Adjustments/Overrides Allowed	(Required) Selected.
Options	(Required) *None*.

4. On the **Time Off Plan Overrides** tab, consider:

Option	Description
Accrual Frequency Method	(Required) *Custom Frequency*.

Option	Description
First Accrual Date	(Required) Example: Select *Worker: Hire Date as of Period End Date*.

5. Click **OK**.
6. On the **Accrual** tab, add another row to create the accrual that specifies the rollback period. As you complete the **Create Accrual** task, consider:

Option	Description

Calculation	(Required) Select a rolling period calculation:
	• *Time Off Quantity During n Periods*: Accrues expired absences of the same type on a daily basis. Workday restores them to the time off plan balance as they expire.
	• *Time Off Quantity During n Periods (Accrual frozen while absent)*: Accrues expired absences of the same type if the worker is active. If the worker is currently taking the same type of absence, Workday pauses the accrual until they return to work. The calculation includes all days.
	• *Reaccrue Time Off Taken in Prior Periods (Accrual Frozen While Absent or Based on Days to Include)*: Accrues expired absences of the same type if the worker is active. If the worker is currently taking the same type of absence, Workday pauses the accrual until they return to work. To use this instance value calculation, you must assign holiday and work schedule calendars to workers when the **Days to Include** value on the time off plan is either:
	  • *Workdays (Non-Holiday)*
	  • *Workdays (Work Hours exceed Holiday Hours)*
	• *Time Off Quantity During n Periods - Including Historic Absence*: Accrues expired balances and checks the rollback period for additional used absences. If Workday finds historic absences in the rollback period, it extends the rollback to the start of the historic absence period. Workday adds the used absences to the balance.

Adjustments/Overrides Allowed	(Required) Unselected.
Options	(Required) *None*.
Amount of Time to Roll Back	(Required) Displays only if you select one of the rolling period calculations listed in the **Calculations** row.
Unit of Time to Roll Back	(Required) Displays only if you select one of the rolling period calculations listed in the **Calculations** row.

Example

This example demonstrates 2 types of calculations for a rolling sick plan.

Your UK company uses a sickness plan with a rolling period accrual. Each employee gets an accrual of 10 sick days for a 12-month period. As the absence administrator, you create 2 accruals:

- The initial accrual granting workers the 10 days.
- The rolling accrual that looks back 12 months for expired accruals and restores them to the employee's balance.

Bill, a UK worker, took 4 days of sickness from August 15 to 18, 2016. On August 17 and 18, 2017, he takes 2 additional days of sickness. We start checking his accrual balance on August 15, 2017, using the 12-month rollback and compare the balances of each based on 2 of the calculations.

Time Off Quantity During n Periods

Date	Balance (days)
August 15, 2017 - Tuesday	7 - Bill is in the office and accumulates 1 day from the expired absence of August 15, 2016.
August 16, 2017 - Wednesday	8 - Bill is in the office and accumulates 1 day from the expired absence of August 16, 2016.
August 17, 2017 - Thursday	8 - Bill takes a sick day. He accumulates 1 day, but uses 1 day.
August 18, 2017 - Friday	8 - Bill takes a sick day. He accumulates 1 day, but uses 1 day. All of the 2016 sick days have reaccrued.

Reaccrue Time Off Taken in Prior Periods (Accrual Frozen While Absent or Based on Days to Include)

Date	Balance (days)
August 15, 2017 - Tuesday	7 - Bill is in the office and accumulates 1 day from the expired absence of August 15, 2016.
August 16, 2017 - Wednesday	8 - Bill is in the office and accumulates 1 day.
August 17, 2017 - Thursday	7 - Bill takes a sick day, Balance freezes until he returns.
August 18, 2017 - Friday	6 - Bill takes a sick day, Balance freezes until he returns.
August 19, 2017 - Saturday	Nonworking day for Bill.
August 20, 2017 - Sunday	Nonworking day for Bill.
August 21, 2017 - Monday	8 - Bill is in the office. Accrual resumes and adds the frozen expired balance of 2 days. All of the 2016 sick days have reaccrued.

Override Accrual Expiration Dates for a Worker

Prerequisites

Security:*Worker Data: Time Off (Adjustments and Overrides)* domain in the Time Off and Leave functional area.

Context

The **Maintain Accrual Expiration Overrides** task allows you to override expiration rules defined on an accrual to handle exceptions or special employee circumstances i.e. an employee on leave..

Steps

1. Access the **Maintain Accrual Expiration Overrides** task.
2. As you complete the task, consider:

Option	Description
Accruals	Select an eligible accrual that has expiration defined.
Accrual Date	Select a valid accrual date. The dates available for selection will include those derived from the period schedule based on the accrual frequency method and accrual adjustments with unique reference dates. **Note:** For accruals using the Instance Value Calculation *Approved Calculated Time for Day for Accrual*, the dates available for selection will only contain dates associated with calculated time blocks and accrual adjustments.
Position	Select a valid position if accrual is part of a position-based time off plan.
Expiration Date	Set this field to the date you want the accrual to expire. The expiration date defaults based on the system calculated expiration date relative to the selected accrual date.

Result

Example

Next Steps

Concept: Accrual and Time Off Limits

You can define accrual and time off limits using 2 approaches. You can define limits for:

- A time off plan, causing the associated accruals and time offs to have the same limits.
- Individual accruals and time offs that override any limits set for the plan.

In addition to limits, other factors can impact a worker's accrual and whether time off is paid or unpaid:

- Accrual timing, as defined by the time off plan or accrual. See Timing of Accrual Processing and Limits on page 2177.
- The calculation order for accruals that occur the same day, as defined by the accrual priority. See Accrual Priorities on page 2178.
- The processing order for time offs, as defined by the time off priority. See Time Off Processing Order on page 2179.

Timing of Accrual Processing and Limits

The **Accrual Frequency Method** field on the time off plan definition or the accrual definition controls the timing of accrual processing. If accrual processing occurs:

- At the beginning of the period, Workday adds the accrual to the time off plan balance. This addition applies accrual limits before subtracting time off. It checks the lower time off limit after subtracting the time off.
- At the end of the period, Workday subtracts time off from the time off plan balance. Workday checks the lower time off limit, adds accruals, and then checks the accrual limit.
- Midperiod (a custom accrual that you create), Workday:

  1. Subtracts time off taken before the accrual date.
  2. Checks the lower time off limit.
  3. Adds the accrual.
  4. Checks the accrual limit.
  5. Subtracts time off taken after the accrual date.
  6. Checks the lower time off limit.

Processing accruals before time off typically results in workers reaching accrual limits sooner, but causes time off calculations to reach lower limits later.

Note: When a time off and an accrual fall on the same day, the accrual adds to the balance before deducting time off. Workday processes carryover that occurs on the same day first.

Example: Timing of Accrual Processing and Upper Accrual Limits

In this scenario, the Vacation Time Off Plan has an upper limit of 120 hours. Workers accrue 12 hours of time off each month. Tony has an initial Vacation balance of 110 hours and requests 8 hours of time off.

- When the **Accrual Frequency Method** is *Start of Period*, Workday:

  1. Adds the current period accrual of 12 hours to the initial balance of 110 for a total of 122 hours.
  2. Applies the limit rule and determines that the balance exceeds the limit by 2 hours.
  3. Reduces the accrual by 2.
  4. Reduces Tony's overall balance by the 8 hours of time off, resulting in a final balance of 112.
- When the **Accrual Frequency Method** is *End of Period*, Workday:

  1. Subtracts the 8 hours of time off from the initial balance of 110 for a total of 102 hours.
  2. Adds the current period accrual of 12 hours for a total of 114.
  3. Applies the limit rule and determines that the balance doesn't exceed the limit, making his final balance 114.

Example: Timing of Accrual Processing and Lower Time Off Limits

In this scenario, the lower limit for a vacation plan is -8 hours. Workers accrue 12 hours of time off each month. Julia has an initial vacation balance of -4 hours and requests 8 hours of time off. Workday processes the time off as follows:

- **Accrual Frequency Method** = *Start of Period*
  1. Adds the current period accrual of 12 hours to the initial balance of -4 for a total of 8 hours.
  2. Reduces her balance by the 8 hours of time off for a total of zero.
  3. Applies the limit rule and determines that the balance doesn't go below the lower limit. Consequently, her entire request processes as paid time off.
- **Accrual Frequency Method** = *End of Period*
  1. Subtracts the 8 hours of time off from the initial balance of -4 for a total of -12 hours.
  2. Applies the limit rule and determines that the balance goes below the lower limit by 4 hours. Consequently, only 4 hours process as paid time off.

  Note: Set the **Maximum Unpaid Time Off Units Allowed** validation rule to zero to prevent requests for unpaid time off.

Accrual Priorities

The order in which accruals process, combined with an upper accrual limit, can affect a worker's accrued time off.

Example: Accrual Priorities and Upper Accrual Limits

In this scenario, 2 accruals, both processed at the beginning of the period, contribute to the Paid Time Off plan:

- Vacation accrues at 10 hours each month. Priority = 1.
- Sick time accrues at 6 hours each month. Priority = 2.
- Upper limit, inherited from plan = 120.

Joan's current Paid Time Off plan balance is 106 hours. Because vacation accrual processes first, she reaches the upper accrual limit before sick time processes. As a result, Joan forfeits 2 hours of Sick time accrual.

Priority	Current Balance: Paid Time Off	Accrual Amount	Balance + Accrual	Upper Limit	Hours Forfeited
1 (Vacation)	106	10	116	120	Zero
2 (Sick Time)	116	6	122	120	2

Time Off Processing Order

The sequence in which time offs process, combined with a lower time off limit, can affect the number of days or hours treated as paid or unpaid time off.

Example: Time Off Processing Order and Lower Time Off Limits

In this scenario, Vacation time off and Sick time off belong to the Paid Time Off plan. Vacation time off has a priority of 1 and a lower limit of -8. Sick time has a priority of 2 and a lower limit of zero.

Joan has an available balance of 8 hours in the Paid Time Off plan. He takes 16 hours of Vacation time plus an additional 8 hours of Sick time. Vacation hours process first, reducing Joan's available balance to -8. Because she doesn't exceed the lower limit, her Vacation days process as paid time off. However, no hours remain in the plan balance to cover Joan's sick time, so the 8 hours of sick time are unpaid.

Priority	Current Plan Balance	Time Off Taken	Balance - Time Off	Lower Limit	Hours Paid
1 (Vacation)	8	16	-8	-8	16
2 (Sick Time)	-8	8	-16	Zero	Zero

Related Information
Tasks

Create Time Off Plans That Track Balances on page 2126

Steps: Create a Time Off on page 2104

Create Accruals on page 2162

Reference

FAQ: When do workers see the Maximum Unpaid Validation? on page 2155

Concept: Accrual Expiration

Accrual Expiration allows individual absence accruals to expire relative to the date accrued. By offering the flexibility to define expiration on a more granular level, like an accrual, you can more accurately track expiration and can better adhere to statutory, union, federal, and company policies.

Prioritization

Expiring balances refer to expiring carryover and expiring accruals. The expiring balance with the earliest expiration is used first when requesting time off.

If balances are expiring on the same day, Workday applies this prioritization to determine which expiring accrual balance to use first:

- Scenario 1: If different accruals are expiring on the same day, Workday uses the accrual with the higher priority first.

- Scenario 2: If the same accruals are expiring on the same day, Workday first uses the accrual that was granted first.
- Scenario 3: If an expiring accrual and carryover balance expire the same day, Workday uses the carryover first.
  - **Note:** This rule doesn't apply to accruals in a time off plan, if you select the **Use Time Off Accrual Before Carryover Balance** check box in the **Carryover**section of the **Balance** tab when creating or editing the plan.

Limitations

You can't remove expiration from an accrual, or an expiring accrual from a time off plan, if the plan has:

- Absence input.
- Accrual expiration overrides.
- Time off plan balance overrides.
- Limit overrides.
- Stored time off balances .
- Time off requests (regardless of status).

Note: To avoid this, it is critical to ensure existing accruals have expiration added using an accrual snapshot date that's in the current or a future period. When creating new accruals with expiration defined for an existing time off plan, add the expiring accrual to the plan using a time off plan snapshot date in the current period or a future period to avoid this issue.

Workday doesn't support these accrual settings when an accrual has an expiration configuration:

- Buy Time Off.
- Calculation set to a Time Off Absence Component Related Calculation (ACRC).
- Options.
- Scheduling.

Workday doesn't support accrual expiration in these time off plan configurations:

- Absence tables
- Transfer balance
- Balance period set to current period
  - You can't transfer balances from or to time off plans that have accruals with expiration defined.

Considerations

Touchpoint	Considerations
Upper limits	Expiring accruals respect time off plan upper limits, accrual

Touchpoint	**Considerations**
	limit overrides, and the option to ignore limits. In the case time off is being accrued on the same day that it expires, the expiration occurs before the upper limit is evaluated.
Accrual adjustments	You can modify reference dates when processing adjustments for expiring accruals in the UI. The reference date selected determines when that accrual adjustment is granted, regardless of the accrual frequency method defined. You can make accrual adjustments for expiring accruals outside of the accruing period, however, Workday doesn't support negative accrual adjustments.
Time off plan balance overrides	Overriding a worker's time off plan balance, doesn't impact expiring accruals.
Termination adjustments	Termination adjustments take expiring accruals into consideration when zeroing out a worker's balance.

Recommendations

When updating existing configurations:

- Don't change the existing balance period.
- Create a new accrual snapshot when adding expiration to existing accruals and a new future time off plan snapshot when adding a new expiring accrual to a plan.

  Note: Using the initial snapshot or a snapshot that's more than 3 months in the past can impact system performance and cause complications with balance calculations. Failure to use the appropriate effective dating may prevent expiration settings from being removed from the accrual.

- Consider carryover dates if replacing expiring carryover with expiring accruals. Example: A Time in Lieu plan is configured with a Month to Date (MTD) balance period and has a carryover expiration rule of 2 months. Company ABC wants to adopt accrual expiration effective October 1st, 2024. These are the steps this company should take:
  - Accrual: Create new snapshot effective Oct 1, 2024 and add an accrual expiration rule of 3 months.
  - Time Off Plan: Create a new time off plan snapshot effective January 1, 2025, and in the Carryover section change **Amount of Time Before Expiration** to 0 months.

Related Information
Reference

Reference: Absence Management Cards

Concept: Accrue-As-You-Go Plans

In an accrue-as-you-go plan, accruals are in response to a time off request rather than accumulating at a constant rate per period. Example: Workers generally accrue bereavement leave in an amount that matches their leave request rather than in weekly or monthly increments.

To create an accrue-as-you-go plan, use the *xxx - Time Off Total* calculation to define the accrual amount (where xxx = the name of the time off). This calculation returns the sum of a worker's time off hours or days in the current period. It can generate accruals that match the number of approved hours or days in the worker's time off request (subject to time off limits).

You can configure an unlimited accrue-as-you-go plan by leaving the limits blank on the accrual and the time off plan to which it contributes. If you want to limit your plan, set the limit on the accrual itself rather than the time off plan. Select **Start of Period** as the **Accrual Frequency Method** to process accruals before time off.

Related Information
Examples

Example: Create an Accrue-As-You-Go Bereavement Plan on page 2198

FAQ: Pause Annual Time Off Accruals for Absent Workers

- Can you pause annual time off accruals for absent workers?
- How can I configure accruals to pause annual time off for absent workers?
- How does the IVC determine the next accrual date?
- How does Workday determine the accrual date for multiple tiers in an absence table?
- What happens when workers are on long-term sick leave?
- Do pending time off events have an impact?
- What happens when the annual accrual date for a balance period coincides with the period schedule start date or end date?
- Can I use the Maximum Unpaid Time Off Units Allowed validation with this instance value calculation?

Can you pause annual time off accruals for absent workers?	Yes, you can delay annual time off accruals to the next available working day, for workers who are absent on the day of their annual accrual and the

day before. Workday processes the accrual only when workers return to work and bases the accrual on the **Days to Include** settings of the related time off plans or absence table tiers. This helps reduce manual effort in entering and correcting accrual details.

How can I configure accruals to pause annual time off for absent workers?

You can use the *Accrual Date Paused if Worker is Absent* instance value calculation (IVC) as an accrual frequency override on an accrual that uses a balance period such as anniversary or year-to-date (YTD). When the accrual is on an absence table, we determine a worker's working days based on a combination of the **Days to Include** settings on the absence table tiers.

1. Access the **Edit Accrual** task.
2. Select the accrual.
3. On the **Time Off Plan Overrides** tab, for **Accrual Frequency Method**, select *Custom Frequency*.
4. From the **First Accrual Date** prompt, select *Accrual Date Paused if Worker is Absent*.
5. Don't enter a value for these options:
   - **Accrual Recurs Every**
   - **Accrual Recurs Unit of Time**

How does the IVC determine the next accrual date?

When workers are sick on the day before and the day of their anniversary, the IVC looks for the next available working day free of a time off event up to a maximum of 364 calendar days. The IVC determines the working days from the **Days to Include** settings across the absence table tiers to accrue automatically on the correct date, instead of accruing on the 364th calendar day.

When workers have a time off event on their anniversary date, the IVC looks back 100 calendar days to find a working day, and to check whether the workers also have a time off event on that day. If there's no working day with a time off event within the 100-day period, which can happen for seasonal workers, the workers accrue on their anniversary date, even if the last working day beyond the 100-day period has a time off event.

When the anniversary of a worker falls on a nonworking day, so there's no time off event, the worker accrues time off on the next working day.

How does Workday determine the accrual date for multiple tiers in an absence table?

When you select the *Accrual Date Paused if Worker is Absent* IVC as an accrual frequency override on 2 or more tiers in an absence table, each with different **Days to Include** settings, Workday determines the accrual based on the combined settings and processes the accrual on the first appropriate day.

Example: Alice has a continuous service date of 2018-05-01, so her expected accrual date each year is May 1. Alice's company uses the *Accrual Date Paused if Worker is Absent* IVC as an accrual frequency override on an absence table that contains 2 tiers. The tiers have time off plans with these settings:

Option	**Tier 1 Time Off Plan**	**Tier 2 Time Off Plan**
Balance Period	*Anniversary Balance Period (based on Continuous Service Date)*	*Anniversary Balance Period (based on Continuous Service Date)*
Days to Include	*Weekdays (Mon-Fri)*	*Configure Days to Include (Sunday-Wednesday)* and **Include Holidays from Holiday Calendar**

Alice takes 2 sicks days on the day before and the day of her anniversary from 2020-04-30 to 2020-05-01 (Thursday-Friday). Saturday isn't a working day for Alice. She takes another sick day on Sunday. As Monday is a bank holiday, Alice receives her annual accrual when she returns to work on 2020-05-05 (Tuesday).

What happens when workers are on long-term sick leave?

When workers have sick leave time off events on the day before their expected accrual date, and continuously until the next expected accrual date, Workday doesn't increment their accruals for a time off plan twice for the same period schedule.

Examples:

- Organization A has a time off plan with a monthly period schedule and a balance period based on employee anniversary dates. Rachel has a hire date of 2018-06-17, so her expected accrual date each year is June 17.

  Rachel has a time off entry on 2019-06-16 and 2019-06-17. Workday pauses the accrual because Rachel has a time off entry on the day before and the day of her anniversary. However, Rachel's time off entry continues up to 2020-06-14.

  Workday processes the accrual on 2020-06-17 for the 2020 period, but Rachel forfeits her 2019 accrual because Workday prevents the same accrual occurring twice in the same period.

- Organization B has a time off plan with a weekly period schedule and a balance period based on employee anniversary dates. John has a hire date of 2018-07-12, so his expected accrual date each year is July 12.

  John takes sick time off from 2019-07-11 to 2020-07-07. He returns on 2020-07-06 but 2020-07-07 is a nonworking day as per the **Days to Include** settings. John forfeits his 2019 accrual because the next working day is 2020-07-08, and he returns to work with his next accrual occurring within the same period schedule.

Setting up time off plans with a weekly schedule can limit the number of accruals workers forfeit, depending on **Days to Include** settings. However, this configuration can affect performance.

Do pending time off events have an impact?

No, Workday doesn't consider pending time off requests when determining whether to pause accruals.

Similarly, after Workday pauses an accrual, subsequent pending time off events don't trigger absence table tier reevaluation or affect whether Workday processes the next accrual for the balance period. However, you can view balances that may be impacted by pending events on these reports:

- **My Time Off Results by Period**
- **Time Off Results by Period**
- **Time Off Results by Period for Workers**

What happens when the annual accrual date for a balance period coincides with the period schedule start date or end date?

When the accrual date for a balance period occurs on the first day of a period schedule, workers receive their accrual on the day before the period schedule start date.

When the accrual date for a balance period occurs on the last day of a period schedule, workers receive their accrual on the last day of the period schedule. To limit the number of accruals workers forfeit, you can:

- Check that any carryover limits set for time off plans on the absence table tiers can accommodate the accruals.
- Run the **Carryover Balances for Organization (by Carryover Date)** report to see who will have balances on the last day of the period.
- Consider adjusting the amount of time before expiration on the time off plan.

Can I use the Maximum Unpaid Time Off Units Allowed validation with this instance value calculation?

To ensure that the *Accrual Date Paused if Worker Is Absent* IVC resolves correctly, you must:

- Only use the *Maximum Unpaid Time Off Units Allowed* validation on time offs that are part of an absence table tier.
- Always have at least 1 tier without a *Maximum Unpaid Time Off Units Allowed* validation.

Related Information
Concepts

Concept: Absence Tiers on page 2266

Setup Considerations: Absence Tables on page 2257

Tasks

Create Absence Tables on page 2261

Create Time Off Plans That Track Balances on page 2126

FAQ: How do I pause a rolling accrual for a number of days?

You can use the *Pause Accrual for Related Time Off Events* instance value calculation (IVC) to pause accruals for a number of days when workers are absent for a defined period before or after their defined anniversary occurs, reducing manual effort. The accruals must use an anniversary-based balance period. The IVC determines the accrual date based on a **Days to Include** setting of *All Days* for each time off plan.

Example: You configure an accrual frequency override to pause a sick time off accrual for 5 days. Rachel has a hire date of 18-02-10. She's sick from 21-02-06 to 21-02-12. Her first day back to work is 21-02-13. Her sick time off balance increases on 21-02-17, after she's back at work for 5 days and eligible for the increment, based on her length of service.

If Rachel is sick before her anniversary, to accrue her increment, she needs to have 5 days without sick time off before her anniversary.

Related time off events correspond to the time off plans that use the accrual. Only time off events for time off types that are part of the same time off plan as the accrual trigger the IVC. Example: When John takes time off on his work anniversary, if that time off isn't against a time off type on the same time off plan as the accrual, he accrues on that day.

To configure the accrual frequency override:

1. Access the **Edit Accrual** task.
2. Select the accrual.
3. On the **Time Off Plan Overrides** tab, for **Accrual Frequency Method**, select *Custom Frequency*.
4. From the **First Accrual Date** prompt, select *Pause Accrual for Related Time Off Events*.
5. In the **Number of Days to Pause an Accrual** field, enter the number of days.

Related Information
Tasks

Create Time Off Plans That Track Balances on page 2126

FAQ: Enabling Workers Retain Their Historical Absence Data

- How can I enable workers retain their historical absence data after we rehire them or they have service or termination date changes? on page 2186
- Should I change time off plans, accruals, and time offs to use the related IVC for hire date, service date, or termination date calculations? on page 2189
- When you change a service date, in which periods does Workday reflect the change? on page 2189

How can I enable workers retain their historical absence data after we rehire them or they have service or termination date changes?

You can use these instance value calculations (IVCs) when you configure:

- Accruals, including accrual frequency on time off plans and scheduling rules.

- Accrual and time off eligibility overrides.
- Balance periods.
- Carryover limits.
- Limit overrides on accruals and time offs.
- Lower and upper limits.
- Time off plan eligibility rules.

When you rehire workers, or they have service or termination date changes, Workday uses the IVCs to calculate the correct dates as of the period.

IVC	Description
• *Recent Hire Date as of Period End Date* • *Recent Hire Date as of Period Start Date*	The most recent hire date for the worker based on the period start date or end date.
• *Recent Continuous Service Date Based on Period End Date* • *Recent Continuous Service Date based on Period Start Date*	The most recent continuous service date for the worker based on the period start date or end date.
• *Recent Seniority Date Based on Period End Date* • *Recent Seniority Date Based on Period Start Date*	The most recent seniority date for the worker based on the period start date or end date. Use to enable workers hired multiple times remain eligible for all periods in which they were previously eligible.
• *Recent Termination Date based on Period End Date* • *Recent Termination Date based on Period Start Date*	The most recent termination date for the worker based on the period start date or end date. Use to enable workers terminated multiple times retain historical eligibility.
• *Recent Time Off Service Date Based on Period End Date* • *Recent Time Off Service Date Based on Period Start Date*	The most recent time off service date for the worker date based on the period start or end date. Use to enable workers hired multiple times, or with job changes, and multiple time off service

IVC	Description
	dates in their history remain eligible for all periods.
• *Recent Union Seniority Date Based on Period End Date* • *Recent Union Seniority Date Based on Period Start Date*	The most recent union seniority date for the worker based on the period start or end date. Use to enable workers to remain eligible for accruals on off plans, based on union-membership eligibility rules.

Other instance value calculations that you can use in Absence components to provide the most recent and accurate historical data for workers include:

- *Recent Benefits Service Date Based on Period End Date*
- *Recent Benefits Service Date Based on Period Start Date*
- *Recent Company Service Date Based on Period End Date*
- *Recent Company Service Date Based on Period Start Date*
- *Recent Date Entered Workforce Based on Period End Date*
- *Recent Date Entered Workforce Based on Period Start Date*
- *Recent Original Hire Date Based on Period End Date*
- *Recent Original Hire Date Based on Period Start Date*
- *Recent Retirement Eligibility Date Based on Period End Date*
- *Recent Retirement Eligibility Date Based on Period Start Date*
- *Recent Severance Date Based on Period End Date*
- *Recent Severance Date Based on Period Start Date*
- *Recent Union Seniority Date Based on Period End Date*

Note:

Workday populates the**Original Hire Date**field automatically from the earliest**Hire Date**. However, if you manually change the**Original Hire Date**field using the**Edit Service Dates**task, Workday doesn't continue to populate the**Original Hire Date**field. The existing*Worker: Original Hire*

*Date*calculation returns the latest**Original Hire Date**value, regardless of the period that Workday needs to evaluate, which can result in incorrect values for historical accrual and time off balances.

As a calculations administrator with modify access to the *Set Up: Time Off (Calculations - Generic)* domain, you can use the *Recent Original Hire Date Based on Period Start Date* and *Recent Original Hire Date Based on Period End Date* IVCs in Absence components instead of the*Worker: Original Hire Date*field to reference the recent original hire date for a worker as of the period start or end dates. These IVCs consider the worker's original hire date as part of accruals or in time off plan eligibility to determine which workers are eligible for specific time off plans.

Should I change time off plans, accruals, and time offs to use the related IVC for hire date, service date, or termination date calculations?

If these absence components use hire date, service date, or termination date calculations, consider whether you need to change their configurations to use the corresponding IVC. Example: Instead of *Continuous Service Date*, you can use *Recent Continuous Service Date based on Period Start Date* or *Recent Continuous Service Date based on Period End Date*.

Consider whether the calculation usages are in:

- Multiple areas. Example: If the usage is in more than 1 accrual, determine whether the IVC is required in each case.
- Multiple effective-dated snapshots of time off plans, accruals, and time offs. To prevent Workday retroactively recalculating historical periods based on a hire date, service date, or termination date change, uptake the IVC on all effective-dated snapshots of the absence component.

  To correct historical periods, you might need to recalculate time off plan balances for workers.
- Workday-delivered calculations that reference hire date, service date, or termination date calculations. In this case, you need to create new calculations that use the IVC manually.

When you change a service date, in which periods does Workday reflect the change?

Workday doesn't support entering an effective date on these business processes but derives service date changes from business process events:

Business Process	Effective Date
Hire	**Hire Date** is the effective date for these service date changes: • **Hire Date**

Business Process	Effective Date
	• **Continuous Service Date** Workday reflects service date changes initiated from a *Hire* event in the period that you hire the worker and in all future periods.
Service Dates Change	The initiated date is the effective date for these service date changes: • **Continuous Service Date** • **Seniority Date** • **Time Off Service Date** Workday reflects service date changes in the period in which you initiate the change, and in all future periods. Workday also populates the **Seniority Date** from the **Hire Date** automatically during the *Hire* business process.
Termination	**Termination Date** is the effective date. Workday reflects termination date changes initiated from a *Terminate* event in the period in which the termination date falls and in all future periods.

Note: When you backdate a service date, Workday doesn't update prior periods.

Related Information

Tasks

Change Worker Service Dates on page 516

Create Accruals on page 2162

Create Time Off Plans That Track Balances on page 2126

Recalculate Balances for Workers on page 2315

Steps: Create a Time Off on page 2104

Reference

Troubleshooting: Time Off on page 2336

Examples

Example: Create a 90-Day Waiting Period for Accruals on page 2204
Example: Configure Accruals Relative to Hire Date and Years of Service on page 2206

FAQ: How do I prevent time off from accruing while workers are on leave?

Identify the leave types that prevent accruals and modify accrual eligibility rules to stop workers on these leave types from accruing.

Example:

1. Update the leave type:
   a. Access the **Edit Leave Type** task.
   b. In the **Leave Impacts** section of the **Details** tab, select the **Absence Accrual Effect** check box.
2. Create a value comparison calculation:
   a. Access the **Create Value Comparison Calculation** task.
   b. Name the calculation something like *Not on LOA with Accrual Effect* and enter:

1st Operand	Operator	2nd Operand
On Leave as of Period End Date with Absence Accrual Effect (a Workday-owned instance value calculation)	*equal to*	*False*

3. Assign the calculation to each accrual you want to stop:
   a. Access the **Edit Accrual** task.
   b. On the **Time Off Plan Overrides** tab, add *Not on LOA with Accrual Effect* to each set (row) of eligibility criteria.

Related Information
Reference

Troubleshooting: Time Off on page 2336

Reference: Feature Availability and Balance Tracking

Compare the features available for time off plans that track balances and plans that don't.

Configuration

Feature	Plans That Track Balances	Plans That Don't Track Balances
Time off data entry validations	All validation types available.	All validation types except: • Time Off Date Before Maximum Override Balance Date Not Allowed • Maximum Unpaid Time Off Units Allowed
Eligibility rules for time off	Yes	Yes
Accruals, including frequencies and limits	Yes	No
Time off limits	Yes	No

Time Off Entry and Maintenance

Feature	Plans That Track Balances	Plans That Don't Track Balances
Enter time off (requests)	Yes	Yes
Review time off (and approve)	Yes	Yes
Revise time off	Yes	Yes
Correct time off	Yes	Yes
Review time off corrections (and approve)	Yes	Yes
View balances and balance projections	Yes	No
Adjust time off	Yes	No
Adjust or override accrual calculations	Yes	No
Calculate and store balances	Yes	No
Suspend accrual and time off limits	Yes	No
Override time off plan balances	Yes	No

Payment-Related Features

Feature	Plans That Track Balances	Plans That Don't Track Balances
Track paid time separately from unpaid time	Yes	No
Pass time off to Workday Payroll or Payroll Interface for use in payroll calculations	Yes	No

Examples: Time Off Setup

Example: Define Eligibility for a Time Off Plan

This example describes how to define eligibility for time off plans.

Context

As part of the HR department, you’re configuring the time off plan for your full-time employees. As part of the process, you need to define eligibility criteria for the time off plan so that it’s available to:

- Employees classified as regular and full-time as of the period end date.
- Employees terminated at midperiod that are regular and full-time on the period start date.

Prerequisites

Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in Time Off and Leave functional area.

Steps

1. Create eligibility criteria for regular employees:

a) Access the **Create Instance Set Comparison Calculation** task.

Enter this information:

Field	**Description**
Name	*Employee Type is Regular (as of Period End Date)*
Source Field	*Employee Type as of Period End Date*
Relational Operator	*in the selection list*
Target Instance	*Regular*

b) Access the **Create Instance Set Comparison Calculation** task.

Enter this information:

Field	**Description**
Name	*Employee Type is Regular (as of Period Start Date)*
Source Field	*Employee Type as of Period Start Date*
Relational Operator	*in the selection list*
Target Instance	*Regular*

c) Access the **Create Logic Calculation** task.

Enter this information:

Field	**Description**
Name	*Employee Type is Regular (as of Period Start Date) AND Worker is Terminated Mid-Period*
Operator	*AND*
Calculation	*Employee Type is Regular (as of Period Start Date)*
Calculation	*Worker: Terminated Mid-Period*

d) Access the **Create Logic Calculation** task.

Enter this information:

Field	**Description**
Name	*Employee Type is Regular*
Operator	*OR*
Calculation	*Employee Type is Regular (as of Period End Date)*
Calculation	*Employee Type is Regular (as of Period Start Date) AND Worker is Terminated Mid-Period*

2. Create the eligibility criteria for full-time employees:

a) Access the **Create Instance Set Comparison Calculation** task.

Enter this information:

Field	Description
Name	*Time Type is Full Time (as of Period End Date)*
Source Field	*Time Type as of Period End Date*
Relational Operator	*in the selection list*
Target Instance	*Full Time*

b) Access the **Create Instance Set Comparison Calculation** task.

Enter this information:

Field	Description
Name	*Time Type is Full Time (as of Period Start Date)*
Source Field	*Time Type as of Period Start Date*
Relational Operator	*in the selection list*
Target Instance	*Full Time*

c) Access the **Create Logic Calculation** task.

Enter this information:

Field	Description
Name	*Time Type is Full Time (as of Period Start Date) AND Worker is Terminated Mid-Period*
Operator	*AND*
Calculation	*Time Type is Full Time (as of Period Start Date)*
Calculation	*Worker: Terminated Mid-Period*

d) Access the **Create Logic Calculation** task.

Enter this information:

Field	Description
Name	*Time Type is Full Time*
Operator	*OR*
Calculation	*Time Type is Full Time (as of Period End Date)*
Calculation	*Time Type is Full Time (as of Period Start Date) AND Worker is Terminated Mid-Period*

3. Combine the eligibility criteria for regular, full-time employees.

Access the **Create Logic Calculation** task.

Enter this information:

Field	Description
Name	*Employee is Regular and Full Time*
Operator	*AND*

Field	Description
Calculation	*Employee Type is Regular*
Calculation	*Time Type is Full Time*

4. Add the eligibility criteria to the time off plan.
   a) Access the **Create Time Off Plan** task.
   b) In the **Enabled for Worker Type** field on the **Eligibility** tab, select *Employee*.
   c) In the **Worker Eligibility** table, add a row and select *Employee is Regular and Full Time*.

Result

Use the **Evaluate Absence Eligibility** report to test whether a worker is eligible for the time off plan as of a date.

Related Information
Concepts
Concept: Eligibility for Time Off Plans, Time Off, and Accruals on page 2142
Tasks
Create Time Off Plans That Track Balances on page 2126
Create Time Off Plans That Don't Track Balances on page 2135
Create Accruals on page 2162
Steps: Create a Time Off on page 2104
Reference
The Next Level: Common Absence Use Cases
The Next Level: The Calculation Engine Behind Absence Management

Example: Display Balances for Plans with Intermittent Time Off

These examples suggest how you might configure balance tracking and visibility for 2 common Absence policies. The examples are for Family Medical Leave Act (FMLA) scenarios, but apply to any type of intermittent time off.

Context

Employees at Cara's company can take PTO concurrently with FMLA. To support this policy, Cara sets up a single time off plan, with 2 time offs that subtract from the plan. Her time off plan must track and display balances because the intermittent PTO reduces its time off plan and FMLA leave balances.

Time Off Plan	Track Balance	Balance Visibility	Time Offs that Subtract from Plan
PTO Plan	Yes	Yes	• *Regular Time Off* • *Intermittent FMLA Time Off*

Employees at Rupert's company must deplete their PTO before taking intermittent FMLA. To support this policy, Rupert sets up 2 time off plans. He must display balances for the *PTO Plan*, and either hide or not track balances for the *Intermittent FMLA Plan*.

Time Off Plan	Track Balance	Balance Visibility	Time Offs that Subtract from Plan
PTO Plan	Yes	Yes	*Regular Time Off*

Time Off Plan	Track Balance	Balance Visibility	Time Offs that Subtract from Plan
Intermittent FMLA Plan	No	Not applicable	*Intermittent FMLA Time Off*

Prerequisites

- Create the *FMLA* leave type.
- Create these time offs:
  - *Regular Time Off*
  - *Intermittent FMLA Time Off* (linked to the *FMLA* leave type)
- Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in Time Off and Leave functional area.

Steps

- Employees can take PTO concurrently with FMLA.
  a) Access the **Create Time Off Plan** task.
  b) Select the **Track Balance** check box.
  c) Select a **Balance Visibility Type**.
  d) On the **Time Off** tab, add 2 rows and select these values in the **Subtracts from Balance** field:
     - *Regular Time Off*
     - *Intermittent FMLA Time Off*
- Employees must deplete PTO before taking intermittent FMLA.
  a) Create the *PTO Plan* that tracks balances and subtracts *Regular Time Off* from the plan's balance.
  b) Create the *Intermittent FMLA Plan*:
     a. Access the **Create Time Off Plan** task.
     b. Leave the **Track Balance** check box blank.
     c. On the **Time Off** tab, add a row and select *Intermittent FMLA Time Off* in the **Subtracts from Balance** field.
  c) Create a leave of absence rule that requires the *PTO Plan* to be depleted before the employee can use FMLA.

Related Information
Concepts

Concept: Coordinated Leaves and Time Off on page 2367

Tasks

Create Time Off Plans That Track Balances on page 2126
Create Leave of Absence Rules on page 2354

Examples

Example: Require Workers to Use Time Off Before FMLA on page 2378

Example: Position-Based Accrual

This example demonstrates how to set up an accrual based on a single position.

Context

Maria holds 2 positions in your company. For every 16 hours she works in her primary position in a pay period, she accrues 1 hour of time off. You need to configure an accrual so that it calculates based on the number of hours reported to payroll in a pay period for Maria's primary position only.

Prerequisites

Security:

- *Set Up: Payroll (Calculations - Generic)* domain in the Core Payroll functional area.
- *Set Up: Time Off (Calculations - Generic)* domain in the Core Payroll functional area.
- *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area.

Steps

1. Create an instance set comparison calculation that identifies payroll result lines as regular or overtime pay.
   a) Access the **Create Instance Set Comparison Calculation** task.
   b) As you complete the task, consider:

Field	Value
Name	*Pay Component is Hourly or Overtime Pay*
Category	*Absence*
Source Field	*Pay Component for Workday Payroll Related Payroll Result Line*
Relational Operator	*in the selection list*
Target Instance	• *Hourly* • *Overtime*

2. Create a conditional calculation that returns line amounts for payroll results (number of hours worked) for hourly or overtime pay.
   a) Access the **Create Conditional Calculation** task.
   b) As you complete the task, consider:

Field	Value
Name	*Regular or Overtime Hours Worked in Period*
Category	*Absence*
Order	*a*
Condition	*Pay Component is Hourly or Overtime Pay* **Note:** The instance set comparison calculation you created earlier.
Result	*Workday Payroll Related Result Line Amount*
Default Response	*0*

3. Create an aggregate calculation that sums the number of hours worked in a period.
   a) Access the **Create Aggregate Calculation** task.
   b) As you complete the task, consider:

Field	Value
Name	*Actual Hours Worked in Period*
Category	*Absence*
Function	*Sum*

Field	Value
Operand	*Regular or Overtime Hours Worked in Period* **Note:** The conditional calculation you created earlier.
Instances for Operand Calculation	*Payroll Hours Related Result Lines for Period - Position*

4. Create an arithmetic calculation that divides the number of hours worked in a period to calculate the accrual.

a) Access the **Create Arithmetic Calculation** task.

b) As you complete the task, consider:

Field	Value
Name	*Accruals for Pay Period*
Category	*Absence*
1st Operand	*Actual Hours Worked in Period* **Note:** The aggregate calculation you created earlier.
Operator	*Divide*
2nd Operand	*16*

5. Create the accrual.

a) Access the **Create Accrual** task.

b) In the **Calculation** field, select *Accruals for Pay Period*.

Result

Maria accrues 1 hour of time off for every 16 hours she works in her primary position.

Related Information

Concepts

Concept: Eligibility for Time Off Plans, Time Off, and Accruals on page 2142

Tasks

Create Accruals on page 2162

Reference

The Next Level: Common Absence Use Cases

Example: Create an Accrue-As-You-Go Bereavement Plan

This example explains how to set up an accrue-as-you-go plan for bereavement time off with a limit of 40 hours.

Context

GMS offers employees an accrue-as-you-go bereavement plan, meaning that they don't accrue bereavement time off with every pay period. Instead, they accrue and use the time off as they request it, with a limit of 40 hours. You have to configure a time off plan that meets these requirements.

Prerequisites

Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in Time Off and Leave functional area.

Steps

1. Define the time off and time off type.
   a) Access the **Create Time Off** task and enter:

Field	Value
Name	*Bereavement Time Off*
Code	*Bereavement Time Off*

   b) From the **Time Off Type** prompt, select **Create**.
   Name the time off type *Bereavement Time Off*.
   c) Under the **Details** tab, enter:

Field	Value
Priority	*1*
Entry Option	*Enter through Time Tracking or Time Off*

2. Create the time off plan.
   a) Access the **Create Time Off Plan** task and enter:

Field	Value
Name	*Bereavement Time Off Plan*
Track Balance	Select the check box.
Balance Period	*Rolling 12 Month Period*
Period Schedule	*Annual*
Unit of Time	*Hours*
Effective Date	*01/01/2024*

   b) On the **Balance** tab, enter:

Field	Value
Balance Visibility	*Eligible in period (based on As of Date)*
Calendar Display	*Plan and Type*
Date	*Balance Period Start Date*

   c) On the **Calculation** tab, enter:

Field	Value
Accrual Frequency Method for Time Off Plan	Select *Start of Period* to process accruals before time off. If you don't select this option, Workday could treat an employee's bereavement request as unpaid time.
Days to Include	*All Days*

   d) On the **Time Off** tab, from the **Subtracts from Balance** prompt, select *Bereavement Time Off* to associate it with the time off plan.

3. Define the accrual calculation.

a) Access the **Create Accrual** task and enter:

Field	Value
Name	*Bereavement Accrual*
Code	*Bereavement Accrual*

b) On the **Calculation** tab, enter:

Field	Value
Calculation	*Bereavement Time Off - Time Off Total* Workday generates this related calculation when you define and associate the bereavement time off with a time off plan. If the*Time Off Total* calculation doesn't display in the **Calculation** prompt, ensure you've defined bereavement time off and associated it with a plan.
Priority	*1*
Options	*None*

4. Associate the accrual with the time off plan.

a) Access the **Edit Time Off Plan** task and enter:

Field	Value
Time Off Plan	*Bereavement Time Off Plan*
Update Existing Effective Date	Select this option and in the corresponding prompt, enter *01/01/2024*, which is the same **Effective Date** specified in Step 2.

b) On the **Accrual** tab, from the **Adds to Balance** prompt, select *Bereavement Accrual* to add it to the time off plan balance.

5. Define the accrual limit.

a) Access the **Edit Accrual** task and enter:

Field	Value
Accrual	*Bereavement Accrual*
Update Existing Effective Date	Select this option and in the corresponding prompt, select *Initial Snapshot*.

b) On the **Time Off Plan Overrides** tab, define the accrual limit in the **Limit Override** section and enter:

Field	Value
Value	*40* (to limit the accrual to 40 hours)
Based On	*Bereavement Accrual* If the accrual you're defining doesn't display in the prompt, save the accrual definition without specifying a limit and then define the limit using the **Edit Accrual** task.

Field	Value
	Always base accrual limits for accrue-as-you-go plans on the accrual itself—not on the balance of the time off plan to which the accrual contributes.
Time Off Plan Balance Period	Displays *Rolling 12 Month Period*, which is the balance period for the time off plan that the accrual is associated with. This is the same **Balance Period** selected in Step 2.

Note: For accrue-as-you-go plans, use the **Edit Accrual** task to define accrual limits. Don't define accrual limits for the time off plan.

Related Information
Concepts

Concept: Accrue-As-You-Go Plans on page 2182

Tasks

Create Time Off Types on page 2121

Steps: Create a Time Off on page 2104

Create Time Off Plans That Track Balances on page 2126

Create Accruals on page 2162

Example: Create a Floating Holiday Plan

This example describes 1 way to create a time off plan for floating holidays.

Context

GMS floating holiday plan gives 16 hours of floating holiday accrual to employees on January 1 of each year. Betty Liu's start date was between January 1 and July 1, so she receives 8 hours in July. Logan McNeil's start date is after July 1, so she doesn't receive any floating holiday until January 1 of the next year. Floating holiday accrual doesn’t carryover to the next year.

Workday provides some of the calculations needed to build the plan. You’ll create calculations that:

- Return 16 hours of accrual in January and 8 hours in July.
- Detect if a worker's hire date is before July.
- Detect whether a worker's hire date is on or before January 1.
- Detect whether a worker's hire date is after January 1.

Prerequisites

Security:

- *Set Up: Payroll (Calculations - Generic)* domain in the Core Payroll functional area.
- *Set Up: Time Off (Calculations - Generic)* domain in the Time Off and Leave functional area.
- *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area.

Steps

1. Define the accrual calculation.
   a) Access the **Create Conditional Calculation** task and enter:

Field	Value
Name	*Floating Holiday Accrual: 16 Hours if January / 8 Hours if July*
Category	*Absence*

   b) Add 2 rows with these values:

Order	Condition	Result
a	*Scheduling: Period Start Date Month = 01 (January)*	*16*
b	*Scheduling: Period Start Date Month = 07 (July)*	*8*

   c) Enter a **Default Response** of *0*.
   d) Click **OK** and **Done**.
2. Define the accrual.
   a) Access the **Create Accrual** task.
   b) For **Name**, enter *Floating Holiday Accrual*.
   c) Enter a **Priority** of *1*.
   d) From the **Calculation** prompt, select *Floating Holiday Accrual: 16 Hours if January / 8 Hours if July*.
   e) For **Options**, select *None*.
   f) Add a row to the **Scheduling** grid with these calculations:

Calculation	Description
Scheduling: Period Start Date Month = 01 (January)	Determines whether the period is the first of the year.
Worker: Hire Date <= Current Calendar Year Start Date (based on Period End Date)	Determines whether the hire date is on or before January 1; the period start date.

   g) Add another row in the **Scheduling** grid with these calculations:

Calculation	Description
Scheduling: Period Start Date Month = 07 (July)	Determines whether the current period is July.
Worker: Hire Date >Current Calendar Year Start Date (based on Period End Date)	Determines whether the hire date is after January 1.

   h) In the same row, create a calculation that determines whether the hire date is between January 1 and July 1 of the current year.
      1. Select **Create** > **Create Value Comparison Calculation** and enter:

Field	Value
Name	*Worker Hire Date < July*

Field	Value
Category	*Absence*

2. In the **Calculation** grid, enter:

1st Operand	Operator
Worker: Hire Date	*less than*

3. In the **2nd Operand** field, select **Create** > **Create Build Date Calculation**.
4. For **Name**, enter *1 July of Current Year (based on Period End Date)*.
5. Enter these values and click **OK**:

Year	Month	Day
Year: Period End Date - Year	*7*	*1*

i) Review the **Scheduling Criteria**:

Scheduling Criteria
Scheduling: Period Start Date Month = 01 (January) *Worker: Hire Date <= Current Calendar Year Start Date (based on Period End Date)*
Scheduling: Period Start Date Month = 07 (July) *Worker Hire Date After 1 January of Current Year* *Worker Hire Date < July*

j) Click **OK** and **Done**.

3. Define the time off.

a) Access the **Create Time Off** task.
b) For **Name**, enter *Floating Holiday Time Off*.
c) From the **Time Off Type** prompt, select *Create Time Off Type*.
d) Add a time off type named *Floating Holiday*.
e) Enter a **Priority** of *1*.
f) Click **OK**.
g) For **Entry Option**, select *Enter through Time Off Only*.
h) Click **OK**.

4. Create the time off plan.

a) Access the **Create Time Off Plan** task and enter:

Field	Value
Name	*Floating Holiday Plan*
Track Balance	Select the check box.
Balance Period	*YTD – Current Calendar Year (based on Period End Date)*
Period Schedule	*Monthly*
Unit of Time	*Hours*

Field	Value
Effective Date	Select the year and month from which the time off plan is effective. Example: *01/01/2022*.

b) On the **Balance** tab, enter:

Field	Value
Balance Visibility Type	*Eligible in period (based on As of Date)*
Calendar Display	*Plan and Type*
Date	*Balance Period Start Date*

c) On the **Calculation** tab, enter:

Field	Value
Accrual Frequency Method for Time Off Plan	*Start of Period*
Days to Include	*Weekdays (Mon - Fri)*

d) On the **Accrual** tab, add a row for **Adds to Balance** and select *Floating Holiday Accrual*.
e) On the **Time Off** tab, add a row for **Subtracts from Balance** and select *Floating Holiday Accrual*.
f) On the **Eligibility** tab, add a row for **Worker Eligibility** and select *Worker Employee Type is Regular as of PS Date*.
g) Click **OK**.

Example: Create a 90-Day Waiting Period for Accruals

This example illustrates how to build a simple eligibility rule that incorporates a waiting period before accruals begin.

Context

An HR administrator at GMS builds an eligibility rule that requires new hires to complete a 90-day waiting period before they begin to accrue 2 days vacation. The rule uses 3 Workday-owned calculations:

- *Recent Continuous Service Date based on Period Start Date*: When the company rehires workers or they have service date changes, Workday evaluates the correct service date as of the period. Using this instance value calculation (IVC) enables workers to retain their historical absence data.
- *90*: A constant value calculation.
- *Date: Current Calendar Month Start Date (based on Period Start Date)*: A build date calculation.

Prerequisites

Security:

- *Set Up: Payroll (Calculations - Generic)* domain in Core Payroll functional area.
- *Set Up: Time Off (Calculations - Generic)* domain in Time Off and Leave functional area.
- *Set Up: Time Off (Calculations - Absence Specific)* domain in Time Off and Leave functional area.

Steps

1. Create a calculation that retrieves the date that is 90 days after the employee's hire date.

a) Access the **Create Date Increment/Decrement Calculation** task and enter:

Field	Value
Name	*Vacation accrual start date (after 90-day wait period)*

Field	Value
Category	*Absence*
Start Date	*Recent Continuous Service Date based on Period Start Date*
Day	*90*

b) Click **OK**.

c) Click **Done**.

2. Create a calculation that compares the date retrieved in the previous step to the current period start date.

a) Access the **Create Value Comparison Calculation** task and enter:

Field	Value
Name	*Vacation accrual start date (after 90-day wait period) >= current calendar month start date)*
Category	*Absence*
1st Operand	*Period: Period End Date*
Operator	*greater than or equal to*
2nd Operand	*Vacation accrual start date (after 90-day wait period)*

b) Click **OK**.

c) Click **Done**.

3. Assign the calculation that you created in the previous step to an accrual as an eligibility rule.

a) Access the **Create Accrual** task and enter:

Field	Value
Name	*Vacation Accrual with Waiting Period*
Code	*vacation-accrual*
Calculation	*2*
Priority	*1*
Options	*None*

b) On the **Time Off Plan Overrides** tab, in the **Worker Eligibility Override** grid, add the *Vacation accrual start date (after 90-day wait period) >= current calendar month start date)* calculation.

c) Click **OK**.

4. Assign the accrual to a time off plan.

a) Access the **Create Time Off Plan** task and enter:

Field	Value
Name	*Vacation Plan with Waiting Period*
Balance Period	*YTD - Current Calendar Year (based on Period End Date)*
Period Schedule	*Monthly*
Unit of Time	*Days*

Field	Value
Effective Date	*01/01/2022*

b) Select the **Track Balance** check box.
c) On the **Balance** tab, enter:

Field	Value
Balance Visibility	*Eligible in period or prior periods (based on As of Date)*
Calendar Display	*Plan and Type*

d) In the **Carryover** section, from the **Date** prompt, select *Balance Period Start Date*.
e) On the **Calculation** tab, select:

Field	Value
Accrual Frequency Method for Time Off Plan	*Start of Period*
Days to Include	*Workdays (Non-Holiday)*

f) On the **Accrual** tab, add the *Vacation Accrual with Waiting Period* accrual.
g) Click **OK**.

Result

Wait until the 90-day period elapses, then view the plan on pages that display the time off balances.

Related Information
Tasks

Create Time Off Plans That Track Balances on page 2126
Create Accruals on page 2162

Example: Configure Accruals Relative to Hire Date and Years of Service

This example illustrates how to configure:

- A custom accrual frequency for a time off plan.
- An accrual that starts relative to the worker's hire date.
- A years-of-service based accrual.

Context

GMS employees are eligible for a time off plan with a monthly period schedule. The plan has 2 accruals:

- A standard 16 hours of time off each month, with the first accrual starting 30 days after their hire date.
- A years-of-service based accrual of 1 hour per period every year for the first 5 years. The accrual increases to 2 hours per period for every subsequent year.

Workday uses a worker's **Continuous Service Date** to calculate years of service.

Example: A worker has a **Continuous Service Date** of 09-15-2015 and accrues 2 hours per period, starting on the monthly period of September, 2020. You terminate the worker on 12-01-2021 and rehire them on 03-05-2022. Workday updates their **Continuous Service Date** to 03-05-2022 to reflect their rehire date. Based on their current **Continuous Service Date**, their years-of-service value is less than 5 years.

You can use either of these instance value calculations (IVCs) to enable workers to retain their historical absence data:

- *Recent Continuous Service Date based on Period Start Date*
- *Recent Continuous Service Date Based on Period End Date*

These IVCs evaluate historical service date changes. They return the respective **Continuous Service Date** for each period, based on either the period start or end date. Example: The 2 hours per period that the worker accrued from September, 2020 through December, 2021 (the period they terminated in) remains at 2 hours. They retain their accrual amount because their prior years-of-service value in those periods is greater than 5.

You need to configure the time off plan so that the accrual frequency and accruals meet your company's requirements.

Prerequisites

Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in Time Off and Leave functional area.

Steps

1. Access the **Create Time Off Plan** task and enter:

Field	Value
Name	*Vacation Time Off Plan A*
Balance Period	*YTD - Current Calendar Year (based on Period End Date)*
Period Schedule	*Monthly*
Unit of Time	*Hours*
Effective Date	*01/01/2022*

2. Select the **Track Balance** check box.
3. On the **Balance** tab, enter:

Field	Value
Balance Visibility	*Eligible in period or prior periods (based on As of Date)*
Calendar Display	*Plan and Type*

4. In the **Carryover** section, from the **Date** prompt, select *Balance Period Start Date*.
5. On the **Calculation** tab, define the accrual frequency calculation.

Field	Value
Accrual Frequency Method for Time Off Plan	*Custom Frequency*
First Accrual Date	**a.** Select **Create** > **Create Date Increment/ Decrement Calculation** **b.** For **Name**, enter *Vacation accrual start date (after 30-day wait period)*. **c.** For **Category**, select *Absence*. **d.** For **Start Date**, select *Recent Hire Date as of Period End Date*. **e.** For **Day**, enter *30*. **f.** Click **OK** to return to the time off plan.
Accrual Recurs Every	*1*
Accrual Recurs Unit of Time	*Months*

Field	Value
Days to Include	*Weekdays (Mon-Fri)*

6. On the **Accrual** tab, add a row for the standard 16-hour accrual.
   a) From the **Adds to Balance** prompt, access the **Create Accrual** task and enter:

Field	Value
Name	*Standard 16-hour accrual*
Code	*standard-16-hour-accrual*
Calculation	*16*
Priority	*1*
Options	*None*

   b) Click **OK**.
7. On the **Accrual** tab, add a row for the years-of-service accrual.
   a) From the **Adds to Balance** prompt, access the **Create Accrual** task and enter:

Field	Value
Name	*Years-of-service accrual*
Code	*years-of-service-accrual*
Priority	*2*
Options	*None*

   b) For **Calculation**, select **Create** > **Create Lookup Calculation** and enter:

Field	Value
Name	*Years of Service Lookup*
Category	*Absence*

   c) For **Lookup Table**, select **Create** > **Create Lookup Table**, then select *Advanced Lookup Table - Numeric Calculation Search Criteria*.
   d) Click **OK**.
   e) On the **Create Lookup Table** task, enter:

Field	Value
Name	*Years of Service Vacation*
Category	*Absence*

   f) For **Numeric Search Criteria**, select **Create** > **Create Date Difference Calculation** and enter:

Field	Value
Name	*Worker Years of Service*
Category	*Absence*
Interval	*Year*
Start Date	*Recent Continuous Service Date Based on Period End Date*

Field	Value
End Date	*Period: Period End Date*

g) Click **OK**.
h) In the **Table Data** section, select an **Effective Date**. Example: *01/01/2022*.
i) Add 3 table data rows to include these value pairs in the respective columns:

Search Value	a
1	*1*
5	*1*
6	*2*

j) Click **OK**.
k) On the **Create Lookup Calculation** task, click the **See in New Tab** icon for the *Years of Service Vacation* lookup table.
l) On the new tab, from the related actions of the *Years of Service Vacation* lookup table, select **Lookup Table** > **Column Labels**.
m) On the **Maintain Column Labels** task, in the **Display Name** column, replace *a* with *Accrual (Hours per Period)*.
n) Click **OK** and **Done**.
o) On the **Create Lookup Calculation** task, in the **Calculation** grid, select:

Field	Value
Column	*Accrual (Hours per Period)*
Period Date Indicator	*Based on Period End Date*

p) Click **OK**.

8. On the **Time Off Plan Overrides** tab, from the **Accrual Frequency Method** prompt, select *End of Period*.
9. Click **OK**.

Related Information
Concepts

Concept: Relationship of Time Off Plan Components on page 2139

Setup Considerations: Calculations

Tasks

Change Worker Service Dates on page 516

Create Time Off Plans That Track Balances on page 2126

Create Accruals on page 2162

Reference

Troubleshooting: Time Off on page 2336

Example: Limit the Length of Time Off Requests

This example shows you how to create a business process validation to limit the length of a time off request.

Context

At Global Modern Services, workers are entitled to 1 day off at a time to attend a wedding. There are no limits to the number of weddings workers can attend in a year, but they are limited to 1 day per time off request.

Prerequisites

- Configure the *Request Time Off* business process.
- Create a *Wedding* time off type.
- Security:
  - *Business Process Administration* in System functional area.
  - *Manage: Business Process Definitions* in System functional area.

Steps

1. Access the **Create Condition Rule** task.
2. In the **Description** field, enter: *Time off requests for weddings are limited to one day each*.
3. Define the **Rule Conditions**.

And/Or	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
AND	*Time Off Types for Time Off Event*	*any in the selection list*	*Value specified in this filter*	*Wedding*
AND	*Time Off Total Units - Days*	*greater than*	*Value specified in this filter*	*1*

4. Access the *Request Time Off business process definition*.
5. From the related actions menu of the initiation step, select **Business Process** > **Maintain Step Conditions**.
6. Add the *Time off requests for weddings are limited to one day each* **Rule**.

Result

When a worker tries to request more than 1 day off for the *Wedding* time off type, Workday displays an error message.

Next Steps

(Optional) Add a custom error message for this validation.

Related Information
Tasks

Create Business Process Condition Rules

Create Time Off Types on page 2121

Example: Set Up State Sick Leave

Context

In your state, employees accrue 1 hour of sick leave for every 30 hours worked, up to 48 hours per year. Accrued balance isn't available until 90th day of employment.

Unused balance can carry over in full to the next time period. Employers can set a limit of up to 24 hours of paid sick time per year.

Prerequisites

These domains in the Time Off and Leave functional area:

- *Set Up: Time Off (Calculations - Absence Specific)*

- *Worker Data: Time Off (Time Off Balances)*

Steps

1. Create calculations.
   a) Access the **Create Arithmetic Calculation** task.
   b) Enter this information:

Option	**Value**
Name	Scheduled Weekly Hours as of PE Date/ 30
Category	*Absence*
1st Operand	*Job Weekly Scheduled Hours (as of Period End Date)*
Operator	*Divide*
2nd Operand	*30*

   c) Click **OK**, then click **Done**.
   d) Access the **Create Date Increment/ Decrement Calculation** task.
   e) Enter this information:

Option	**Value**
Name	Continuous Service Date + 90 days
Category	*Absence*
Start Date	*Worker Continuous Service Date*
Day	*90*

   f) Click **OK**, then click **Done**.
   g) Access the **Create Value Comparison Calculation** task.
   h) Enter this information:

Option	**Value**
Name	Period Start Date >= Continuous Service Date + 90 days
Category	*Absence*
1st Operand	*Period: Period Start Date*
Operator	*greater than or equal to*
2nd Operand	*Continuous Service Date + 90 days*

   i) Click **OK**, then click **Done**.
2. Create a time off.
   a) Access the **Create Time Off** task.
   b) Enter this information:

Option	**Value**
Name	State Sick Leave Time Off
Code	Enter an identification code for your time off.
Time Off Type	*Sick (Hours)*

Option	Value
Adjustments Allowed	Enable adjustments.
Entry Option	Specify whether workers can enter requests for this time off through Time Tracking, Absence Management, or both.

c) On the **Validations** tab, add a row with these values:

Option	Value
Data Entry Validation	*Maximum Unpaid Time Off Units Allowed*.
Maximum Unpaid Time Off Units Allowed	*24*.
Maximum	*48*
Minimum	*0*
Time Off Entries to Include	*Individual Time Off Entry*

d) Click **OK**.

3. Create an accrual.

a) Access the **Create Accrual** task.

b) Enter this information:

Option	Value
Name	State Sick Leave Accrual
Code	Enter an identification code for your accrual.
Calculation	*Scheduled Weekly Hours as of PE Date/ 30*

c) Select the **Time Off Plan Overrides** tab.

Enter this information:

Option	Value
~Worker~ Eligibility Override	Period Start Date >= Continuous Service Date + 90 days
Value	48

d) Click **OK**.

4. Access the **Create Time Off Plan** task.

5. Enter this information:

Option	Value
Name	State Sick Leave Time Off Plan
Track Balance	Enable balance tracking.
Balance Period	*YTD- Current Calendar Year (based on Period End Date)*
Period Schedule	*Weekly (Mon-Sun)*
Unit of Time	*Hours*

Option	Value
Effective Date	Enter a date for this plan to be available for your workers.

6. On the **Balance** tab, enter:

Option	Value
Balance Visibility	*Never show balance*
Calendar Display	*Plan*
Overrides Allowed	Enable overrides.
Date	*Balance Period Start Date*

7. On the **Calculation** tab, enter:

Option	Value
Accrual Frequency Method for Time Off Plan	*End of Period*
Time Off Plan Balance Lower Limit	*0*
Daily Quantity Default	*Worker Work Schedule Calendar: Workday hours for date (based on As of Date) no rounding*
Days to Include	*All Days*

8. On the **Accrual** tab, select *State Sick Leave Accrual* on the **Adds to Balance** field.
9. On the **Eligibility** tab, specify that the time off plan is available for all workers in your state using the **Country / Country Region** field.
10. On the **Time Off** tab, add a row to the grid and select *State Sick Leave Time Off* on the **Subtracts from Balance** prompt.
11. Click **OK**.
12. Access the **Edit Accrual** task and enter *State Sick Leave Accrual*.
13. Select the **Time Off Plan Overrides** tab.
14. Enter *State Sick Leave Time Off Plan* in the **Based On** field.
15. Click **OK**.

Result

Eligible employees can enter sick leave time off requests.

Related Information
Reference

The Next Level: Common Absence Use Cases

Example: Bulk Load Time Off Requests into Workday

When uploading a high volume of time off requests through an EIB spreadsheet or existing web services, you must follow certain criteria. This example illustrates how to configure the EIB spreadsheet for the *Import Time Off Request Event Batch* web service.

Context

You want to bulk upload a high volume of time off requests into Workday.

Steps

1. Set Up Inbound EIB.

   Generate an EIB spreadsheet based on the *Import Time Off Request Event Batch* web service.
2. Prepare the EIB spreadsheet using these criteria:
   - Don't enter a time off request before the latest persisted balance date.
   - Don't include time off requests more than 99 weeks old.
   - Don't split workers across files. All entries for a worker should be in the same file.
   - Each row has a unique ID in the tenant.
   - Each time off request in the same time off type has only 1 unit for the same date per row. Example: A worker requests 3 hours time off and 2 hours time off of the same type and on the same date. Include these requests as 5 hours on the same row. If you're loading requests with start and end times, you can use multiple rows.
   - Each worker has only 1 line key.
   - Order requests chronologically, from oldest to most recent.
   - You can enter an optional **Time Off Entry ID** value for each entry that you're loading. If you specify a value, it must be unique. When you leave it blank, Workday generates an ID automatically.
   - You can use multiple header keys. All time off requests from an individual worker must use the same header key.
3. Launch EIB Spreadsheet Upload.

Result

You can view your time off requests in Workday.

Related Information
Concepts

Concept: Importing Time Off Request Events on page 2229

Example: Correct Time Off Entries Using the Adjust Time Off EIB

This example illustrates how to generate an EIB spreadsheet template with data for the *Adjust Time Off* web service operation to correct time off entries. Workday removes time off entries corrected to zero from third-party calendars.

Context

You want to adjust existing time off entries by passing in the adjusted units and not the corrected amounts. You'll create a custom report for your time off entries and run the report to help you populate the EIB input file with the report results.

Steps

1. Access the **Create EIB** task.
2. Enter a **Name** value. Example: *Adjust Time Off Example* .
3. Select *Inbound*.
4. Click **Next**.
5. From the **Web Service Operation** prompt, select *Adjust Time Off*.
6. Click **Next**.
7. From the **Template Model from Web Service Operation** prompt, select *Adjust Time Off*.
8. Click **Next** and **OK**.
9. From the related actions menu of the integration system, select **Template Model** > **Generate Spreadsheet Template**.
10. Select the **Confirm** check box and click **Submit**.

11. Access the **Create Custom Report** task.
12. Enter these values:

Field	Value
Report Name	*Workday Time Off Entries*
Report Type	*Advanced*
Optimized for Performance	Clear the check box.
Data Source	*Time Off - All Statuses*

13. On the **Columns** tab, add these rows:

Business Object	Field
Worker	*Worker*
Worker	*Employee ID*
Time Off Entry	*Reference ID*
Time Off Entry	*Time Off Date*
Time Off Entry	*Time Off Type for Time Off Entry*
Time Off Entry	*Units*
Time Off Entry	*Entered On*
Time Off Entry	*Request or Correction*

14. Click **OK**.
15. From the related actions menu of the custom report, select **Custom Report** > **Run**.
16. In the *Adjust Time Off* EIB spreadsheet, enter values for these fields:

Field	Consideration
Spreadsheet Key	Specify a unique value for each worker.
Run Time Off Validation	Set to *Y* if you want to validate time off entries for the time off request. If any time off entries fail validation for a time off request, Workday rejects the entire time off request.
Worker	This is a required value. You might need to change the reference ID value in cell D4 of the spreadsheet from *Contingent Worker ID* to *Employee ID*. The default value is *Contingent Worker ID*. Columns that include *ID Type* values enable you to select a reference ID type for each row of data. Example: If you're loading employees and contingent workers in a single EIB, select the reference ID type for each person or row.
Row ID	This is typically a value of *1* for each entry, unless you have multiple row entries for the same worker.
Time Off Entry ID	If you want to assign a reference ID to the newly created correction event, enter a value here.

Field	Consideration
	If you leave the field blank, the web service automatically assigns a value.
Time Off Entry	Reference ID of the time off entry that you're adjusting. Use the value from the custom report.
Adjustment to Requested	Enter the number of units to add or remove from the time off entry. Example: If you want to adjust the time off from 8 hours to 6 hours, enter -2. This isn't the correction value.

17. Access the **Launch / Schedule Integration** task.
18. From the **Integration** prompt, select the *Adjust Time Off Example* integration.
19. In the **Value** column of the **Integration Attachment** row, select **Create Integration Attachment**.
20. Select the *Adjust Time Off* EIB spreadsheet file and click **OK**.
21. Click **OK**.

Example: Calculate the Carryover Limit for a Time Off Plan

This example illustrates 1 way to calculate carryover-limit amounts and includes these calculations:

- Conditional
- Instance Set Comparison

Context

Global Modern Services (GMS) wants to change their US vacation time off plan to enable workers to carryover different amounts, depending on their location. Example: When their primary work state is California, GMS wants to change the carryover limit from 80 units to 120 units. For all other states, the carryover limit will remain at 80 units.

Ben is a California employee whose carryover balance will change from 80 units to 120 units over the carryover period, based on a new effective date of 12-31-2018 for the time off plan. Jeremy works in Atlanta so his carryover limit of 80 won't change.

Prerequisites

Create a time off plan for US vacation that tracks balances.

Security: These domains in the Time Off and Leave functional area:

- *Set Up: Time Off (Calculations - Absence Specific)*
- *Worker Data: Time Off (Time Off Balances)*

Steps

1. Create calculations.
   a) Access the **Create Instance Set Comparison Calculation** task.
   b) Enter or select these values:

Field	Value
Name	*Primary Work State = California*
Category	*Absence* and *Payroll*
Source Field	*Primary Work State as of Period End Date*
Relational Operator	*in the selection list*

Field	Value
Target Instance	*California*

c) Click **OK** and **Done**.
d) Access the **Create Conditional Calculation** task.
e) Enter or select these values:

Field	Value
Name	*Hourly Vacation Carryover*
Category	*Absence*

f) In the **Conditional Calculations** grid, add a row with these values:

Field	Value
Order	*a*
Condition	*Primary Work State = California*
Result	*120*

g) From the **Default Response** prompt, select *80*.
h) Click **OK** and **Done**

2. Access the **Edit Time Off Plan** task.
3. Select the time off plan. Example: *USA Vacation Plan (Hourly)*.
4. On the **Balance** tab, in the **Carryover** section, enter these values:

Field	Value
Date	*First Period of Balance Period Start Date*
Limit	*Hourly Vacation Carryover*

5. Click **Ok**.

Result

The conditional calculation returns true for workers with a primary work location of California as of the period end date, and Workday enables eligible workers to carryover 120 units of time. Otherwise, workers have a carryover limit of 80. To verify the calculations and that the changes take effect:

- Access the **Find Workers** report to identify workers by location.
- Select **Time and Absence** > **View Time Off Results by Period** as a related action on the worker profile for workers based in California and another state such as Georgia.
- Select different balance periods on either side of the effective date to identify how many units the worker carried over each year. Select the last period of the previous year, the first and last periods of the next year, and so on. Example:
  - *2017> 12/18/2017-12/31/2017 (Bi-weekly (Mon-Sun))*
  - *2018>01/01/2018-01/14/2018 (Bi-weekly (Mon-Sun))*
  - *2018>12/31/2018-01/13/2019 (Bi-weekly (Mon-Sun))*
  - *2019>01/14/2019-01/27/2019 (Bi-weekly (Mon-Sun))*

Related Information
Reference

Reference: Numeric Calculations

The Next Level: The Calculation Engine Behind Absence Management

Example: Set Up Segmented Security for Time Off

This example illustrates how to configure access to specific time offs for specific groups of users.

Context

You're the security administrator at Global Modern Services (GMS). You want to configure access to a set of time offs for managers so that they can request and correct time off on behalf of other workers.

Prerequisites

Create the time offs that you want to secure. Example: Time offs for sick days, vacation, and holidays.

Opt in to Segment Security for Time Off.

Security:

- *Security Configuration* domain in the System functional area.
- *Set Up: Time Off* domain in the Time Off and Leave functional area.

Steps

1. Access the **All Time Off Security Segments** report.
2. View the time off security segments in your tenant. If your tenant contains an existing *Segment-Based Security Group for All Time Off Segment* segment that's mainly for administrators, you can remove several security groups from the segment-based group. Otherwise, skip steps a-d.
   a) From the related actions menu of the *Segment-Based Security Group for All Time Off Segment* security group, select **Segment-Based Security Group** > **Edit**.
   b) From the **Security Groups** prompt, remove these groups:
      - *Manager*
      - *Management Chain*
   c) Click **OK**.
   d) Click **Done**.
3. Create a time off security segment for managers.
   a) Access the **Create Time Off Security Segment** task.
   b) Specify these values:

Field	Value
Name	*Manager Time Offs Segment*
Time Offs	Select all of the time offs that managers should be able to enter for their direct reports. Example: Vacation time off and holiday time off.

   c) Click **OK**.
   d) Click **Done**.
4. Create a time off security segment for all employees.
   a) Access the **Create Time Off Security Segment** task.
   b) Specify these values:

Field	Value
Name	*Employee Self Service Time Offs Segment*

Field	**Value**
Time Offs	Select a smaller set of time offs that workers should be able to request and correct. Example: Vacation time off and holiday time off.

c) Click **OK**.
d) Click **Done**.

5. Create a segment-based security group for managers.

a) Access the **Create Security Group** task.
b) Specify these values:

Field	**Value**
Type of Tenanted Security Group	*Segment-Based Security Group*
Name	*Manager Time Offs*

c) Click **OK**.
d) Specify these values:

Field	**Value**
Security Groups	• *Manager* • *Management Chain*
Access to Segments	*Manager Time Offs Segment*

e) Click **OK**.
f) Click **Done**.

6. Create a segment-based security group for all employees.

a) Access the **Create Security Group** task.
b) Specify these values:

Field	**Value**
Type of Tenanted Security Group	*Segment-Based Security Group*
Name	*Time Offs - Employee Self Service*

c) Click **OK**.
d) Specify these values:

Field	**Value**
Security Groups	*Employee as Self*
Access to Segments	*Employee Self Service Time Offs Segment*

e) Click **OK**.
f) Click **Done**.

7. Edit the domain security policy.
   a) Access the **View Domain** report.
   b) Select *Time Off Segmented Setu* from the **Domain** report.
   c) From the related actions menu, select **Domain** > **Edit Security Policy Permissions**.
   d) In the **Report/Task Permissions** section, add these groups with View access:
      - *Manager Time Offs*
      - *Time Offs - Employee Self Service*
   e) If the *Access Time Off (Segmented)* domain security policy contains the *All Users* security group, remove it.
   f) Click **OK**.
   g) Click **Done**.
8. Activate the security policy changes.
   a) Access the **Activate Pending Security Policy Changes** task.
   b) In the **Comment** field, enter:

      Created time off security segments to enable manager and employee self-service access to sets of time offs.
   c) Click **OK**.
   d) Select the **Confirm** check box.
   e) Click **OK**.
   f) Click **Done**.

Result

Managers can view all time offs in the *Manager Time Offs* security segment when they enter or correct time off on behalf of workers using these tasks:

- **Enter Absence**
- **Enter Time Off**
- **Correct Absence**
- **Correct Time Off**

Employees can request or correct time off for the time offs in the *Employee Self Service Time Offs Segment* segment.

Next Steps

Compare access for different groups of users. Example: Sign in to Workday as a worker such as Ben Adams and access 1 of these tasks to view the set of time offs that you can access:

- **Request Absence**
- **Request Time Off**

Create additional time off security segments and segment-based security groups to create a more fine-grained segment-based time off security model, depending on your requirements.

Related Information
Tasks
Steps: Set Up Segmented Security for Time Off on page 2108
Reference
2021R1 What's New Post: Segmented Security for Time Off
FAQ: Segmented Security for Time Off on page 2154

Example: Validate Time Off Requests Against Working Days in Workday Scheduling

This example illustrates how to configure a time off plan in Absence Management to validate time off requests against working days in Workday Scheduling.

Context

You're an Absence Administrator at Global Modern Services and want to configure a time off plan that checks whether the requested days in a time off request are working days in Workday Scheduling for a worker. If the worker doesn't have a published schedule or isn't part of a scheduling organization, Absence uses the configured **Days to Include** setting *Workdays (Non-Holiday)*. This setting uses a Work Schedule Calendar (WSC) to determine the working days for workers. For hourly workers who don't have a consistent work pattern stored in their WSC, a static fall-back option such as *Workdays (All Days)* might be more appropriate.

Enrique Valdez is a manager who generates and publishes a schedule for his team in the **Time and Scheduling Hub**. See Steps: Set Up Schedule View for Managers.

Prerequisites

- Create a time off plan with an accrual and time off. Example: A vacation plan with these values:

Field	Value
Name	*USA Vacation Plan (Hourly)*
Balance Period	*YTD - Current Calendar Year (based on Period End Date)*
Period Schedule	*Bi-weekly (Mon-Sun)*
Unit of Time	*Hours*
Effective Date	*09/21/2020*
Balance Visibility	*Eligible in period (based on As of Date)*
Calendar Display	*Plan and Type*
Overrides Allowed	*Yes*
Date	*First Period of Balance Period Start Date*
Accrual Frequency Method for Time Off Plan	*End of Period*
Time Off Plan Balance Lower Limit	*0*
Time Off Plan Balance Upper Limit	*200*
Daily Default Quantity	*8*
Days to Include	*Workdays (Non-Holiday)*
Accrual	*USA Vacation Plan Accrual*
Time Off	*USA Vacation Plan Time Off*

See Create Time Off Plans That Track Balances.

- Assign a WSC to a worker. Example: A WSC with a 30-hour Monday-Friday, 8:00 AM - 3:00 PM pattern.

Field	Value
Name	*Hourly PT 6 Hours (08:00-15:00) (Scheduling)*
Description	*For Hourly Part Time scheduling workers. FTE=0.75. 8AM to 3PM with lunch break.*
Pattern Start Date	*04/01/2024*

Field	Value
Pattern Start Day	*Monday*

See:

- Create Work Schedule Calendars.
- Create Rules for Assigning Calendars
- Manually Assign Work Schedule Calendars

- Security: *Set Up: Time Off (Calculations - Absence Specific)* and *Worker Data: Time Off (Time Off Balances)* domains in Time Off and Leave functional area.

Steps

1. Access the *Edit Time Off Plan* task and select the time off plan. Example: *USA Vacation Plan (Hourly)*.
2. On the **Calculation** tab, in the **Time Off Taken** section, select **Use Scheduling Shifts**.
3. Select **Restrict Requests to Days to Include on Calendar** to restrict the worker from requesting non-working days and click **OK**.
4. To verify the configuration, log into Workday as a manager and search for a worker on your team. Example: *Enrique Valdez* searches for *Audrey Novak*.
5. From Audrey's Worker profile, select **Calendar** > **View Worker Calendars** and click **OK**. Example: This team member is assigned a WSC with a pattern from 8AM-3PM Mon-Fri.
6. Access the **Scheduling** report in the **Time and Scheduling Hub**. Audrey has a published schedule for the week of Jan 27-Feb 2, 2025. Enrique, Audrey's manager, has assigned her an extra shift on Saturday, February 1 but she needs to request time off on that day.
7. Log into Workday as Audrey and access the **Manage Absence** task.
8. Request 2 days off: Thursday, Jan 30 and Saturday, Feb 1. Workday allows you to submit the request for Saturday even though it's not a working day in Audrey's WSC. This is because she has a published shift on this date in Workday Scheduling, which takes priority and is considered a working day. Workday considers it a working day if the worker has a working shift for any of their positions.
9. Request vacation for Friday, January 31, when Audrey has no shifts. Workday doesn't allow the request even though it's a working day in her WSC and displays an error message. This is because Audrey's published schedule in Workday Scheduling doesn't schedule her to work on Friday and this takes priority. Click **Discard**.
10. Audrey wants to book vacation time in July but her schedule isn't published this far into the future. Request a week off from Sunday July 13-Saturday July 19, 2025 using the vacation time off plan. Workday detects that there's no published schedule and falls back to the **Days to Include** setting of *Workdays (Non-Holiday)* using Audrey's WSC. Because the selected days include non-working days, Workday doesn't submit those days for approval or display them on the absence calendar and automatically removes non-working days from the request.
11. Log into Workday as an Absence Administrator or manager and access the **View Absence Occurrences Detail** report.
12. Note that Workday reevaluates absence occurrences in line with absence requests and Workday Scheduling published shifts. For Audrey's first request, Workday displays 2 **Workdays** and 3 **Calendar Days**. Friday is a non-working day as she has no scheduled shifts that day but there's a published schedule for the week.
13. Log into Workday as Audrey's manager Enrique and publish another shift for Audrey on Friday and move the shifts that conflict with her approved time off to **Unassigned Shifts**. Making Friday a working day triggers Workday to split the absence occurrences for Audrey's time off on Thursday, Jan 30 and Feb 1 into 2 individual occurrences.

Related Information

Reference

2025R1 Feature Release Note: Connected Experience: Scheduled Days to Include

Time Off Requests

Steps: Set Up Time Off Notifications

Prerequisites

- ../../../../manage-workday/tenant-configuration/notifications-and-alerts/email-notifications/tar1431980339489.dita.
- ../../../../manage-workday/tenant-configuration/mobile-setup/dan1370796452612.dita.

Context

You can create and send automated email and mobile time off notifications for:

- Workers who you want to remind to take time off, based on specific criteria.
- Managers and administrators who have time off requests requiring their approval.

You can also run reports with completion analytics to report on who has taken action on the notifications within a specified time period.

Steps

1. Copy Reports.

   Copy and modify a standard report based on the Worker business object as a basis for the notification recipient audience. Example: Create a copy of the **Time Off Approvers with Events Awaiting Action** report and share with absence administrators.

   Security:

   - *Indexed Data Source: Workers* domain in the Staffing functional area.
   - *Worker Data: Time Off (Time Off)* domain in the Time Off and Leave functional area.
2. Access the **Edit Tenant Setup - Notifications** task.

   See: Reference: Edit Tenant Setup - Notifications.

   Security: *Set Up: Tenant Setup - BP and Notifications* in the System functional area.
3. Select the **Absence Management** tab in the **Notification Delivery Settings** section to override the parent notification type delivery settings. Workday mutes email and push notifications for the routing rule by default.
4. Unmute email and push notifications.
   a) In the **Rule** prompt, select *Notification Routing Rule for Notification Parent Type Absence Management* rule.
   b) From the related actions menu of the rule, select the **Notification Routing Rule for Notification Parent Type Absence Management** link in the pop-up window.
   c) On the **View Notification Routing Rule** report, select **Notification Routing Rule** > **Edit** from the related actions menu of the rule.
   d) Click **Add** to add notification channels.
   e) Select *Email* in the **Channel** prompt and *Immediately* in the **Default Frequency** prompt to enable email notifications.
   f) Select *Mobile Push Notifications* in the **Channel** prompt and *Immediately* in the **Default Frequency** prompt to enable mobile push notifications.
5. (Optional) Access the **Create Distribution Time Period** task.

   Create custom time periods that you can select in the **Content** prompt when you create scheduled distributions for absence management or time tracking. When you run the **Scheduled Distribution Report**, Workday uses these time periods to determine if workers took action on the notification on time. Example: You can create a custom time period that Workday uses to look forward by 10 days from the date of the notification to search for time off event requests.

Security: *Administer Scheduled Distribution* domain in the System functional area.

6. Access the **Create Scheduled Distribution** task.

   Enter the distribution **Item Details**.

   a) Select the notification **Content Type**.

      - When you select *Request Time Off*, Workday sends notifications to workers to remind them to take time off. The notifications include a link or an Inbox button that directs workers to the *Request Time Off* or *Request Absence* business process.
      - When you select *Review Time Off*, Workday sends notifications to managers and administrators who have time off requests that require their approval. The notifications include a link or an Inbox button that directs the manager or absence partner to their Inbox for approval.

   b) Under **Content**, select the time period that you want to include in the search:

      - A custom period.
      - *Last 14 Days* to search minus 14 days from the date you send out the notification.
      - *Last 7 Days* to search minus 7 days from the date you send out the notification.
      - *This Month* to search from the first day of the month to the date you send out the notification.
7. Complete the scheduled distribution **Audience** details.

   Select a saved audience or create a new audience. From the **Type** prompt, select:

   - *Organization*, if you selected *Request Time Off/ Request Absence* in Step 7.
   - *Custom Report*, if you selected *Review Time Off* in Step 7, and your custom report based on **Time Off Approvers with Events Awaiting Action**. In the **Report Criteria** section, filter the audience results by specifying report field values such as:

     - **Coordinated Time Off Type**
     - **Start Date**
     - **End Date**

   When defining audiences for scheduled distributions, consider that the time periods in your report criteria make sense in terms of the content time period that you selected in Step 7.
8. Complete the **Setup** details.
9. Complete the **Messages** details to define the time off notification message content for each channel.
10. For **Distribution Frequency**, select a **Run Frequency** to specify how often you want to send the notification.
11. Complete the **Schedule** details by naming the request and initiate the schedule distribution job.
12. Create a new custom report or access a Workday-delivered standard report that allows you to report on scheduled distributions. Example: You can edit the report named **Scheduled Distribution Report**.

    Ensure your report has a row that includes the **Completion Status** report field on the *Connect Record* business object.

    Security: *Modify* access on the *Administer Scheduled Distributions* domain.

Next Steps

After the scheduled distribution runs, run the scheduled distribution report to check whether workers, managers, and administrators took the appropriate action in the specific time period. When the content type for the notification is:

- *Request Time Off/ Request Absence*, the **Completion Status** report field returns true if the notification recipient has created a new time off entry within the time period.
- *Review Time Off*, the **Completion Status** report field returns true if the notification recipient no longer has any time off events requiring their approval within the time period.

Related Information

Tasks

Set Up Mail Servers for Email Notifications

Set Up Mobile Push Notifications

Create Email Templates

Reference

2020R2 What's New Post: Scheduled Distributions in Absence Management

Enter Time Off Requests

Prerequisites

- Set up time off plans.
- Configure the *Request Time Off* or the legacy *Absence Calendar* business process and security policy in the Time Off and Leave functional area.

Context

You can enter a time off request on behalf of a worker using the **Request Absence** task.

When entering a request for workers, you can project time off balances and view:

- Current balances for time off plans.
- Holidays if the worker has a holiday calendar.
- Time off requests.

Workers can enter time off requests using the **Request Absence** task on the **Manage Absence** report on the Home dashboard. They can also use the Workday mobile app to request time off.

Steps

1. Access the **Manage Absence** report.

   To project balances for a future date, update the **Balance as of** date.
2. Click **Switch Worker** and select the worker.

   Workday displays the current aggregate balance of all the worker's time off plans as of the date specified in the **Balance as of** field. If a worker has both hour-based and day-based plans, it displays total hours and days separately.

   You can configure the **Balances as of date in the New Absence Calendar Experience** option on the **Edit Tenant Setup - HCM** task.
3. On the **Manage Absence** calendar, select the days for the time off request.
4. Click **Request Absence**.
5. Enter details for the time off. As you complete this task, consider:

Option	Description
Type of Absence	Displays only the time off types, absence tables, and leave types that the worker is eligible for, either: • On the request date. • On the first day of the request, if you selected multiple dates as part of the same request.
Position	Displays only if you select a time off type that is position-based.

Option	Description
	When a worker has only 1 position that's eligible for the time off, Workday displays it. A plus sign (+) after a position name identifies it as a secondary position.
Start Time **End Time**	Displays only if you select a time off type that you've configured to display an optional or required start and end time.
Daily Quantity	Applies to each date requested. Example: If Mary is taking 2 days off from a daily plan, enter *1* for each day. If she's taking 8 hours off each day and the plan is hourly, enter *8.* If the time off or time off plan has a defined **Daily Quantity Default**, Workday displays a value that's based on the first day of the request. If the time off is configured to **Calculate Quantity Based on Start and End Time**, Workday displays a read-only value in the **Daily Quantity** field. This value equals the duration of time between **Start Time** and **End Time**. **Note:** In the Absence Calendar Experience, when you request absence on behalf of another worker, if you've selected the **Restrict Requests to Days to Include on Calendar** check box when you configure the calculation details for the time off plan, Workday: • Sets the **Daily Quantity** to 0 on the unscheduled days. • Treats the **Restrict Requests to Days to Include on Calendar** validation as True on all tiers. Workday displays an alert for the employee self-service experience to indicate that your request only includes days that aren't working days and you can edit individual days to include the days or go back to the calendar to remove them.

Result

If the time off request requires approval, Workday routes it to the reviewers.

Workday saves a time off request for later, if it fails to validate either the:

- Leave of absence.
- Business process.

You can revise the request in My Tasks.

Next Steps

- To view the latest plan balance that takes into account the requested time off, enter a **Balance as of** date that falls after the time off dates.
- If you need to correct a request that has already been approved, use the **Manage Absence** report.

Related Information
Tasks

Correct Approved Time Off Requests on page 2228

Reference

The Next Level: PATT Touchpoints with Assignments

Review Time Off Requests

Prerequisites

Configure the *Request Time Off* or the legacy *Absence Calendar* business process and security policy in the Time Off and Leave functional area.

Context

Review a new or revised time off request in My Tasks and approve, deny, or return the request to the initiator for revision. When reviewing a request, you can view:

- The worker's time off balances.
- Previous requests, including in-progress requests.
- Adjustments.

Steps

1. Access the time off request in My Tasks.
2. (Optional) Click **View Balances** to review the **Time Off Balance as of Current Date** grid to view how the request impacts available, requested, and remaining time off for time off plans that track balances.

   For absence tables, in the **Request Details** grid, you can drill down into the amount requested to see from which tier Workday deducts time off.
3. Enter a **Comment** if you're denying or sending back the request to the initiator for revision.
4. Click **Approve**, **Deny**, or **Send Back**.

Result

When you send back a request, Workday sends the **Revise Time Off** task to the initiator's My Tasks.

You can use the **Approved Time Off** report to view approved time off requests.

Note:

This report references the approval date of time off requests, and not the actual absence or time off dates. Example: Your direct reports have approved time off in February. You run the report using start and end dates for February. Workday doesn't include their time off for February because you approved their time off requests in January. To view only time off within a specific date range, use the **All Worker Time Off** report instead.

Related Information
Tasks

Set Up Mass Operations

Correct Approved Time Off Requests

Prerequisites

- Ensure the time off request has an *Approved* status.
- Configure the *Correct Time Off* business process and security policy in the Time Off and Leave functional area.

Context

You can correct an approved time off request on behalf of a worker. You can review projected time off balances for the worker and see pending requests awaiting approval. You can also view adjustments. Workers can use the Workday mobile app to correct time off requests.

Steps

1. Access the **Correct Time Off** task.
2. Select a time off entry or **Select All**.
3. Edit the time off request. As you complete this task, consider:

Option	Description
Type	Select **Edit Time Off Type** on the **Edit Tenant Setup - HCM** task to enable workers to change time off type.
Position	Displays only if the time off is associated with a position-based plan.
Start Time **End Time**	Displays only if you select a time off type that has optional or required start and end time configured.
Daily Quantity	You can't change the daily quantity for time offs that are configured to **Calculate Quantity Based on Start and End Time**.
Reason	Displays only if you define reasons on the time off.
Comment	Comment for the time off request.

4. To delete a time off entry, set the **Daily Quantity** to zero or remove the row.
5. **Submit** the correction.

Related Information
Concepts

Concept: Canceling Time Off Requests on page 2231

Concept: Balance Projections for Time Off on page 2317

Reference

https://community.workday.com/node/502717

Review Time Off Corrections

Prerequisites

Configure the *Request Time Off* and *Correct Time Off* business process or the legacy *Absence Calendar* business process and their related security policies in the Time Off and Leave functional area.

Context

You can review a corrected time off request in My Tasks and approve, deny, or return the request to the initiator for revision. When reviewing the request, you can view:

- Projected time off balances.
- Previous requests including those that are in-progress (submitted but not yet approved).
- Any adjustments made.

If a reviewer isn't available or you want to approve multiple time off corrections that are in-progress, use the **Mass Operation Management** task. This task advances business process requests for a group of workers using a custom report. Your custom report must generate a list of time off correction events that need approval. Configure relevant security groups in the *Manual Advance* action of the *Correct Time Off* business process security policy.

Steps

1. Access the time off correction in My Tasks.
2. (Optional) Review the **Balance Projection** grid to see how the correction impacts requested and remaining time off.
    - The grid applies only to time off plans that track balances.
    - The **Requested** balance displays the difference between the original and corrected time off and can be a positive or negative number.
3. Enter a comment if you're denying or sending back the corrected request for revision.
4. Click **Approve**, **Deny**, or **Send Back**.

Related Information
Concepts
Concept: Balance Projections for Time Off on page 2317
Tasks
Set Up Mass Operations

Concept: Importing Time Off Request Events

You can load large volumes of time off request events into Workday using an Enterprise Interface Builder (EIB) based on the *Import Time Off Request Event Batch* web service. You can use this web service to:

- Load batches of time off events in bulk.
- Load time off request events in Workday from a third-party tool.
- Migrate validated time off events into Workday.

When loading time off request events, Workday recommends that you:

- Don't disable the **Maximum Unpaid Time Off Units Allowed** time off validation as disabling it can lead to bad data with absence tables.
- Don't include time off requests more than 99 weeks old.
- Don't load multiple files in parallel as it reduces performance and introduces risk.
- Don't turn off re-evaluation as it can create invalid data that impacts workers' balances and payroll.
- For extremely large volumes of data, split the data across multiple files. However, it introduces risk.
- Include all time off entries for a worker in the same file.
- Load the data in 1 file to ensure easy management of large volumes of data.
- Order requests chronologically, from oldest to most recent.

Tips for Entering Data in the EIB Spreadsheet

As you complete the *Import Time Off Request Event Batch* EIB template, consider these fields:

Field	Notes
Header Key	Determines the batch for a time off request event. Use the same header key to group all events in a batch. Example: To load events in 2 batches, use *1* for the first 500 rows and *2* for the next 1,000 rows.
Line Key	An incremental value for each row within a header key batch. Example: Use *1* for the first row, *2* for the second row, *3* for the third row, and so on. Restart the numbering at 1 for a new batch.
Row ID	A unique numerical value for each time off entry.
Time Off Entry ID	An optional, unique value for each entry that you're loading. If you specify a value, it must be unique. When you leave it blank, Workday generates an ID automatically.

Business Process

Importing a batch of time off request events launches the *Request Time Off* business process. You can add users to the security groups of the *Import Time Off Request Event Batch (WS Background Process)* initiating action to enable them to load time off request events in batches.

Rescinding and Correcting Time Off Request Events

The *Request Time Off* business process doesn't enable you to rescind any incorrect time off entries that you inadvertently uploaded. However, you can use the *Adjust Time Off* EIB to correct the incorrect entries unless the entries are still in-progress. In that case, you can use the *Mass Cancel* business process.

Validating Time Off Request Events

Workday runs a set of validations on all time off entries after it has passed through the web service operation and flags invalid entries. These validations maintain data quality when importing time off requests in to Workday. If your EIB spreadsheet contains invalid time off entries, you can view the errors in a *Failure Report*. Workday generates the failure report after you run the **Launch / Schedule Integration** task to upload the EIB spreadsheet.

Related Information
Tasks

Set Up Inbound EIB

Launch EIB Spreadsheet Upload

Examples

Example: Bulk Load Time Off Requests into Workday on page 2213

Concept: Updating Time Off Requests that are Awaiting Approval

You can update time off requests while they are in the approval process if the time off request has an *In Progress* status. You have several options for updating a time off request before it is approved. You can:

- Send the request back to the initiator with a comment asking the worker to make the revision.
- Deny the request and add a comment asking the worker to enter a new request with the correct information.
- Approve the request, then use the **Correct Time Off** task.

- Cancel the *Request Time Off* business process and use the **Enter Time Off** task to enter a new request on the worker's behalf.

  To cancel the business process:

  - Find the worker and select a related action of **View Time Off**.
  - In the **Time Off Event** column, select a related action of **Business Process > Cancel** from the time off event.

Related Information
Tasks

Review Time Off Requests on page 2227

Correct Approved Time Off Requests on page 2228

Concept: Canceling Time Off Requests

You can cancel a time off request if it has a status of *In Progress* and you belong to a security group on the *Cancel* action on the business process security policy.

If the request has a status of *Successfully Completed*, you can no longer cancel it. Instead, correct the request:

- Workers can use the **Correct My Time Off** or **Correct My Absence** tasks.
- Administrators can use the **Correct Time Off** or **Correct Absence** task.

To cancel a time off request in **My Tasks**, click the gear icon and then select **Cancel**.

Note: The **More** > **Cancel** button that displays on the notification doesn't cancel the business process event.

To cancel a time off event from elsewhere in Workday, select **Business Process** > **Cancel** from the related actions menu of the business process event.

To delete unsubmitted time off requests entered through Time Tracking, access either of these tasks and click the unsubmitted time block:

- **Enter My Time**
- **Enter Time**

On the **Enter Time** dialog, click **Delete**.

Related Information
Tasks

Correct Approved Time Off Requests on page 2228

Buy and Sell Time Off

Setup Considerations: Buy Time Off

You can use this topic to help make decisions when planning your configuration and use of Buy Time Off. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Buy Time Off provides you the ability to configure time offs that your workers can buy using the **Buy Time Off** task. You can configure the:

- Time period when workers can buy time offs.
- Maximum quantity of time off that workers can buy.
- Period in which the maximum quantity of time off applies.
- Allowable time off increments for workers to buy.
- Time when worker's time off balance is updated.
- Time when payroll adjustments start and end.
- Pay rate to use for payroll adjustments.

Business Benefits

With this feature, you can configure time offs that can be purchased so that workers can buy time off, allowing them to take more time off than they currently have accrued, and pay off the purchased time off in 1 or more pay periods. Workday automatically adjusts the workers' time off balance when time off is bought.

Use Cases

Administrators can define the criteria for workers to buy time off on the accruals and buy schedules, including the pay rate at which the time off is purchased, and when the worker's time off balance is updated. They can use calculations when creating earnings and deductions.

Workers can buy time off when needed. They can also view details of the time offs that they bought, including the pay rate at which they bought the time off, and the time off balance.

Workday Payroll can automate the purchase of time off that workers buy.

Managers and administrators can use the standard report or create custom reports to identify the:

- Time offs that workers bought.
- Accruals that have been configured for buying.
- Pay component related calculations for time off bought.

Questions to Consider

Questions	Considerations
How do you want your employees to view the task for buying time off? Example: Should they see "purchase leave" or some other term?	You can use custom labels to override the "buy time off" term. Employees see the custom label and can search for the custom label when they buy time off.
When do you allow employees to buy time off? Only during a specific time frame, such as open enrollment or any time throughout the course of a year?	You can set up schedules to allow when workers can buy time off. Different time offs can have different schedules. You can configure the schedule using the **Create Schedule for Buying Time Off** task, as well as on the accrual that is configured for buying, under the **Available to Buy During** field.

Questions	Considerations
What pay rate do you want to use when employees buy time off?	When you set up the accrual, you can select the pay rate you want the time off to be purchased at: • *At the start of first pay adjustment*. Workday uses the worker's pay rate at the start of the first pay adjustment period for all pay periods. This is fixed. • *Current rate during each pay period*. Workday uses the worker's pay rate for each pay period. This could vary if the worker's pay rate changes in a pay period. • *When time off was purchased*. Workday uses the worker's pay rate at the time when they purchased time off for all pay periods. This is fixed.

Recommendations

When testing payroll, consider your business requirements as well as any scenarios that may occur. For example:

- A worker who bought time off is terminated before the full amount is paid back. Workday will calculate the amount that the worker owes and reduce their pay by the full amount.
- A worker is on leave and has no gross pay. Review your configuration for workers on leave on the **Nonactive (On Cycle, On Demand Replacement)** tab of the run category, as well as how you track arrears and configure recouping.

Ensure you test how Workday handles the scenarios with your configuration, so you know how to advise your workers.

Requirements

No impact.

Limitations

- Managers and administrators can't buy time off on behalf of workers.
- You can't add accruals configured for buying time off with position-based time off plans.
- You can't use manual pay inputs in Workday Payroll. On the deduction or earning, clear the **Input Amount Allowed?** check box in the **Calculation Details** section and clear the **Input Allowed?** check box in the **Related Calculations** grid.
- When using third-party payroll, Payroll Effective Change Interface (PECI) and Payroll Interface Common Output File (PICOF) aren't currently supported. You can add the new report fields on the new Buy Time Off Event business object in custom integrations or manual inputs in your payroll system.
- Buy Time Off shouldn't be considered FLSA eligible.

Tenant Setup

No impact.

Security

Configure the *Buy Time Off* security domain in the Time Off and Leave functional area.

Business Processes

Configure the *Buy Time Off* business process in the Time Off and Leave functional area to enable workers to buy time off.

Reporting

Reports / Report Fields / Tasks	Considerations
Time Off Bought by Workers	Enables you to identify workers who have bought time off within a selected date range and view details of the time off they bought.
Maintain Accrual and Time Off Adjustments/ Overrides	Enables you to view details of time off bought by a worker.
All Accruals	These additional columns on the **All Accruals** report enables you to easily view which accruals are configured for buying: • **Allow to Buy Time Off** • **Buy Time Off Display Name** • **Fixed Period** • **Anytime** • **Buy Schedule** • **Balance Updated in Period** • **Maximum Limit to Buy** • **Period in which balance is updated** • **Balance Period** • **Allowable Increments to Buy** • **Pay Rate for Adjustments**

Reports / Report Fields / Tasks	Considerations
Report Fields	You can use these report fields on the Buy Time Off Event business object (secured to the *Public Reporting Items* domain) in your custom reports to view bought time off details: • **Accrual** • **Date Payroll Adjustments Begin** • **Date Payroll Adjustments End** • **Date Time Off Balance Updated** • **Date Time Off Bought** • **Effective Date of Pay Rate for Payroll Adjustments** • **Pay Rate for Adjustments** • **Time Off Quantity Bought** • **Unit of Time** You can use these report fields on the Accrual business object (secured to the *Public Reporting Items* domain) in your custom reports to view configuration options: • **Allow to Buy Time Off** • **Allowable Increments to Buy** • **Anytime** • **Balance Period** • **Balance Updated in Period** • **Buy Schedule** • **Buy Time Off Display Name** • **Fixed Period** • **Maximum Limit to Buy** • **Pay Rate for Adjustments** • **Period in which balance is updated** You can use the **Accrual on Buy Time Off Event** report field on the Absence Component business object (secured to the *Set Up: Calculations - Generic* domain) to identify the accrual against which time off was bought and can be used in the context of Workday Payroll.
Report Data Source (RDS) and RDS Filter	• **Buy Time Off Events for Workers** (secured to the *Worker Data: Time Off* and *Worker Data: Time Off (Time Off Manager View)* domains). Enables you to create custom reports to view instances of workers who bought time off. • **Buy Time Off Events by Organization and Date Range** RDS filter on the **Buy Time Off Events for Workers** RDS. Enables you to view instances of workers across multiple organizations who bought time off within a selected date range.

Reports / Report Fields / Tasks	Considerations
Calculations	You can use these calculations when you create earnings and deductions: • **Quantity of Bought Time Off to Pay Off in the Current Pay Period** • **Last Pay Period to Pay Off Bought Time Off** • **Quantity of Bought Time Off to be Paid** • **Quantity of Bought Time Off to Pay Off Each Pay Period** • **Time Off Bought in a Buy Time Off Event** • **Total Pay Periods to Pay Off Bought Time Off**
Pay Component Groups	You can create custom reports to identify the pay component related calculations for time off bought: • **Buy Time Off in Days** • **Buy Time Off in Hours** • **Pay Rate for Time Off Bought in Days** • **Pay Rate for Time Off Bought in Hours**

Integrations

Integrations or Web Services	Considerations
Get Schedules for Buying Time Off	Retrieves the buy schedule information.
Put Schedule for Buying Time Off	Uploads: • A new buy schedule or a buy schedule that was created in a third-party system or in another Workday tenant. • Additional fields to an existing buy schedule.
Get Accruals, *Put Accrual*, and *Put Time Off Plan*	These web services have additional fields for buy time off options.

Connections and Touchpoints

When using Workday Payroll, Buy Time Off interacts with this feature in Workday:

Feature	Considerations
Payroll Calculations	You can create either a memo earning to help convey the pay rate to a deduction or a negative earning to reduce gross wages without creating a deduction. Worker eligibility isn't needed on both the earning and deduction. Workday uses the Pay Component Group for the pay component related calculations to determine the workers who bought time off for the period schedule used in the earning and deduction. We don't recommend setting the pay component for proration on the earning and deduction, as this may cause calculation issues. See Steps: Set Up Payroll for Buy Time Off.

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information
Concepts

Setup Considerations: Earnings and Deductions

Tasks

Add Earnings or Deductions to Pay Component Groups

Examples

2024R2 Feature Release Note: Buy Time Off

Steps: Set Up Buy Time Off

Prerequisites

Security: *Buy Time Off* domain in the Time Off and Leave functional area.

Context

You can set up Buy Time Off to enable workers to buy time off when needed and to pay off the purchased time off in 1 or more pay periods using the **Buy Time Off** task. You can configure the:

- Time period when workers can buy time offs.
- Maximum quantity of time off that workers can buy.
- Period in which the maximum quantity of time off applies.
- Allowable time off increments for workers to buy.
- Time when worker’s time off balance is updated.
- Time when payroll adjustments start and end.
- Pay rate to use for payroll adjustments.

You can configure multiple time frames on a buy schedule. You must set up separate accruals for buying and accruing time offs.

When you configure time offs for buying:

- Managers and administrators can’t buy time off on behalf of workers.
- You can't add accruals configured for buying time off with position-based time off plans.
- You can't use manual pay inputs.

Steps

1. Create Accruals on page 2162.

   Set up the accrual for buying.
2. Access the **Create Time Off Plan** or **Edit Time Off Plan** task to link the accrual you created to a time off plan on the **Accrual** tab.

   This accrual must have either *Start of Period* or *End of Period* for the **Accrual Frequency Method**.

   Additionally, you can add regular accruals to the time off plan.
3. Access the **Create Schedule for Buying Time Off** task.
   a) The period schedule you select must match the period schedule on the time off plan that is associated with the accrual.
   b) Define 1 or more time periods for workers to buy time off. Consider:

      - Selecting dates based on the time zone for the worker.
      - When you select a period from the **Updated Balance in Period** prompt, Workday derives the exact date when the time off bought is updated either from the **Accrual Frequency Method** defined on the time off plan or on the **Time Off Plan Overrides** tab of the accrual when you configure a time off plan override.
      - A date range to derive the pay periods in which payroll adjustments, either deductions or negative earnings, for time off bought are made from the **Start Payroll Adjustments on** and the **End Payroll Adjustments on** prompts.

      A buy schedule must be linked to an accrual to enable workers to buy time off during fixed periods.
4. Edit Business Process Security Policies.
   a) Select *Time Off and Leave* as the functional area and *Buy Time Off* as the business process.
   b) Edit permissions to determine the security groups:

      - For the Buy Time Off initiating action.
      - That can view all, approve, cancel, rescind, and deny buy time off requests for workers.
5. Edit Business Processes.

   Create a default definition for the *Buy Time Off* business process.
6. (Optional) Set Up Worklets.

   Add the **Buy Time Off** task to 1 or both of these worklets:

   - **Absence**
   - **Time Off**
7. (Optional) Access the **Configure Profile Group** task.
   a) From the **Profile Group** prompt, select *Time Off for Worker Profile*.
   b) In the **Report** column in the grid, select *Time Off Bought* to display the **Time Off Bought** tab on the worker profile.
8. (Optional) Create Custom Labels.

   Create a custom label for buy time off.
9. (Optional) Steps: Set Up Workday Payroll for Buy Time Off on page 2239.

Result

Workers can buy time off when they access the **Buy Time Off** task from the:

- **Absence** or **Time Off** worklets.
- **Time and Absence** related actions of their worker profile.
- **Time Off Balance** and **Time Off Bought** tabs on the **Time Off** section of their worker profile.
- Actions menu on the **Manage Absence** report.

They can also access the task on their mobile devices (Android, iPhone, and iPad) from their worker profile:

- **Time and Absence** related actions menu.
- **Time Off Bought** tab on the **Time Off** section.

Next Steps

You can review time offs bought by workers with the:

- **Maintain Accrual and Time Off Adjustments/Overrides** task.
- **Time Off Bought by Workers** report.

Related Information
Concepts
Setup Considerations: Earnings and Deductions
Tasks
Steps: Create Deductions
Steps: Create Earnings
Add Earnings or Deductions to Pay Component Groups
Examples
2024R2 Feature Release Note: Buy Time Off

Steps: Set Up Workday Payroll for Buy Time Off

Prerequisites

Security: *Set Up: Payroll (Calculations - Payroll Specific)* domain in the Core Payroll functional area.

Context

You can create either a memo earning to help convey the pay rate to a deduction or a negative earning to reduce gross wages without creating a deduction. Worker eligibility isn't needed on both the earning and deduction. Workday uses the Pay Component Group (PCG) for the pay component related calculations (PCRCs) to determine the workers who bought time off for the period schedule used in the earning and deduction. Workday doesn't recommend setting the pay component for proration on the earning and deduction, as this may cause calculation issues. The rate of pay will be determined at the end of the period, and mid-period compensation changes will not be taken into account.

Steps

1. Access the **Create Earning** task.
2. On the **Effective Dated** tab, consider:

Option	Description
Calculation Details	From the **Calculation** prompt, select a base minimum calculation. For a: • Memo earning, select *Rate*. • Negative earning, select *Hours (unprorated) * Rate * -1.00*. You can add any calculation that you need. For example: If you allow workers to buy time off at 80% of their pay rate, you would create an arithmetic calculation for *Rate * 0.8*.

Option	Description
	If needed, ensure you have an appropriate **Override Frequency** on the calculation. For example: *Hourly* or *Daily*.
Related Calculations grid	Consider these PCRCs, ensuring you have the correct PCGs for the PCRCs: • Rate: Both the memo earning and negative earning need a rate calculation. Select only 1 PCG in the **Groups** column based on how you calculate the rate and how the time off was bought, either *Pay Rate for Time Off Bought in Hours* or *Pay Rate for Time Off Bought in Days*. From the **Override Calculation** prompt, select *Compensation: Compensation Element Value (using PC Freq Override)*. • Hours (unprorated): An hours PCRC is only needed if you use a negative earning. Select *Buy Time Off in Hours* or *Buy Time Off in Days* in the **Groups** column and *Quantity of Bought Time Off to Pay Off in the Current Pay Period* for the **Override Calculation**.
Compensation Element	Add the compensation element that considers the buy back rate.
Input Amount Allowed?	You can't use manual pay inputs in Workday Payroll. Clear the **Input Amount Allowed?** check box in the: • **Calculation Details** section • **Related Calculations** grid

See Enter Earning or Deduction Calculations.

3. On the **Non-Effective Dated** tab, in the **Groups** field, select the appropriate PCG.

   See Add Earnings or Deductions to Pay Component Groups.
4. Access the **Create Deduction** task if you created a memo earning in Step 1.
5. On the **Effective Dated** tab, consider:

Option	Description
Calculation Details	From the **Calculation** prompt, select *Hours (unprorated) * Rate*.
Related Calculations grid	Consider these PCRCs, ensuring you have the correct PCGs for the PCRCs: • Rate: Select *Select Earning - Rate*. Note that *Earning* is the PCRC on the earning that you configured in Step 1. For example: If the earning in Step 1 is called *Buy Time Off Memo*, select *Buy Time Off Memo - Rate*. • Hours (unprorated): Select *Buy Time Off in Hours* in the **Groups** column and *Quantity of*

Option	Description
	Bought Time Off to Pay Off in the Current Pay Period for the **Override Calculation**.
Input Amount Allowed?	You can't use manual pay inputs in Workday Payroll. Clear the **Input Amount Allowed?** check box in the: • **Calculation Details** section • **Related Calculations** grid

See Enter Earning or Deduction Calculations.

6. On the **Non-Effective Dated** tab, in the **Groups** field, select the appropriate PCG.

   See Add Earnings or Deductions to Pay Component Groups.

Result

The earning or deduction is available for use in payroll processing upon the effective date.

Example

Next Steps

Related Information
Concepts

Setup Considerations: Earnings and Deductions

Tasks

Steps: Create Deductions

Steps: Create Earnings

Examples

2024R2 Feature Release Note: Buy Time Off

Concept: Buy Time Off

With Buy Time Off, your workers can buy time off when needed and pay off the bought time off in 1 or more pay periods. Workday automatically adjusts the workers' time off balance when time off is bought. Administrators and managers can't buy time off on behalf of workers.

Example: Workers Can Buy Time Off During Scheduled Times in a Year

Scenario

Your organization wants to set up Buy Time Off for workers to purchase additional time off twice a year, in June and December. For time off purchased in June, the time off balance is updated on July 1, and payroll deductions occur from July to December. For time off purchased in December, the time off balance is updated on January 1 of the following year, and payroll deductions occur from January to December of the following year.

Setup

You can create a buy schedule for June and December to allow workers to buy time off, defining when the balance will be updated for each schedule, and when payroll adjustments will start and end. Link this schedule to the accrual that is set up for buying. If you use Workday Payroll, create a deduction so that the time off purchased by the workers can be deducted from their paycheck in the corresponding pay periods.

Result

If a worker purchases time off in both December and June, 2 deductions, 1 for each purchase, will be applied in the pay periods starting in July.

Example: Workers Can Buy Time Off at Any Time

Scenario

Your organization has a monthly time off plan with an accrual configuration that allows workers to purchase time off at any point during the year. The **Accrual Frequency** is set to *Start of Period* and the **Balance Updated in Period** is set to *Next Period*.

Result

If a worker purchases time off on March 15, the time off balance will be updated on April 1. Payroll adjustments will be calculated from April 1 of the current year through March 31 of the following year.

Worker Experience

Your workers can access the **Buy Time Off** task from the:

- Search.
- **Absence** or **Time Off** worklets.
- **Time and Absence** related actions of their worker profile.
- **Time Off Balance** and **Time Off Bought** tabs on the **Time Off** section of their worker profile.
- Actions menu on the **Manage Absence** report.

They can also access the **Buy Time Off** task on their mobile devices (Android, iPhone, and iPad) from their worker profile:

- **Time and Absence** related actions menu.
- **Time Off Bought** tab on the **Time Off** section.

On the **Buy Time Off** task, workers can select an accrual they want to buy time off from and the quantity of time off and consider:

Option	Description

Type of Time Off	Defaults to the accrual that workers are eligible to buy from when workers are only eligible to buy from 1 accrual.
	
	Workday displays the accrual either as the Buy Time Off display name that is configured on the accrual or the name of the accrual.
	
	Accruals are available for workers to select from when:
	
	• You select the **Allow to Buy** option for the accrual.
	• Workers are eligible to buy time off from the accrual.
	• The current date is valid for workers to buy time off. The accrual is configured with either of these options:
	    • *Anytime*.
	    • *Fixed Period*, and the current date is within the start and end dates that are defined on the buy schedule.

Option	Description
Hours or Days	Workers can enter the quantity of time off they want to buy. Workday displays the label as either **Hours** or **Days** based on the unit of time defined on the time off plan of the accrual.
Note	Displays the allowed quantity of time off that the worker can buy. The note is not displayed when you haven't configured these prompts on the accrual: • **Maximum Limit to Buy** on the **Buy Options** tab. • **Upper Limit Override** on the **Time Off Plan Overrides** tab.
Comments	Workers can enter comments if you enable it on the *Buy Time Off* business process security policy.

When workers submit their buy time off requests, Workday routes the event for approval based on how you set up the *Buy Time Off* business process. Workers can only request time off against purchased quantities if the buy time off event is approved.

You can also set up the business process to auto complete.

When workers buy their time off, they can view details of the time off bought on the **Time Off Bought** tab on the:

- **My Absence**, **My Time Off**, and **View Time Off** reports.
- **Time Off Balance** tab on the **Time Off** section of their worker profile.

The details of the time off bought include the accrual that the time off was bought from, the quantity of time off, the date when the time off was bought, the date when the time off balance is updated, the status of the buy time off event, and the Cancel or Rescind options, if applicable.

Time Off Balance Updates

Once the status of the buy time off event is successfully completed, the time off balance updates with the quantity bought on the date based on the configuration:

- When workers can buy time off at any time and the **Balance Updated in Period** is set to:
  - *Current Period*, the time off balance will be updated in the period corresponding to the date that the workers bought time off.
  - *Next Period*, the time off balance will be updated in the next period corresponding to the date that the workers bought time off.
- When workers can buy time off during fixed periods, the time off balance will be updated based on the period selected in the buy schedule.

The date when the time off balance is updated is based on the accrual frequency method that is defined on the time off plan, either *Start of Period* or *End of Period*, or as defined on the **Time Off Plan Overrides** tab on the accrual.

Reporting

You can run the **Time Off Bought by Workers** report to view a list of workers who have bought time off within a selected date range and details of the time off bought, including the accrual from which the time off was bought, the date when the time off balance is updated and when payroll adjustments begin and end, the pay rate for the payroll adjustment, and the status of the buy time off event.

You can also view details of time off bought by a worker on the **Buy and Sell Time Off Adjustments** tab from the **Maintain Accrual and Time Off Adjustments/Overrides** task, including the accrual from which the time off was bought, the period and date in which the time off balance is updated, and the buy time off event. Workday only displays events in approved or completed status in the grid.

You can run the **All Accruals** report to view which accruals have been configured for buying.

Related Information
Examples

2024R2 Feature Release Note: Buy Time Off

Steps: Set Up Sell Time Off

Prerequisites

Security: *Set Up: Time Off* domain in the Time Off and Leave functional area.

Context

You can set up Sell Time Off to enable workers to sell back a portion of their accrued time off using the **Sell Time Off** task. You can configure the:

- Maximum quantity of time off that workers can sell.
- Minimum time off balance to maintain when workers sell time off.
- Time off increments and types that workers can sell.
- Worker eligibility rules to determine who can sell time off.

You can configure multiple time frames on a sell schedule. You must set up separate time offs for selling and requesting time offs.

When you configure time offs for selling:

- Managers and administrators can't sell time off on behalf of workers.
- You can only associate the time offs with worker-based time off plans.
- You can't link the time offs to an absence table.
- You can't rescind or cancel sell time off.
- You can't use time off validations.

Steps

1. (Optional) Access the **Create Schedule for Selling Time Off** task.

   Create a schedule for workers to sell time off during a fixed period.

   a) Select the time frame that you want workers to be able to sell time off.
   b) In the **Update Balance On** prompt, select the date that you want Workday to update the worker's time off balance when they sell time off.

   Dates are based on the time zone for the worker from 00:00 (midnight) to 23:59.
2. Access the **Create Time Off** task. See: Steps: Create a Time Off on page 2104.

   Create time offs for workers to sell time off.

   a) Select the **Allow to Sell Time Off** check box.
   b) As you complete the **Sell Options** tab, consider:

Option	Description
Available to Sell During	Specify when workers can sell their time off: • *Fixed Period*. When you want workers to sell time off only during the period defined in the sell schedule.

Option	Description
	• *Anytime*. When you want workers to sell time off at any time. Workday updates the time off balance on the day that the workers sell their time off.
Maximum Limit to Sell	Select the maximum quantity of time off that workers can sell.
Maximum Limit Applies to	When you define the **Maximum Limit to Sell**, Workday requires you to select either the: • *Period in which balance is updated*. When you want workers to be able to sell the maximum quantity of time off in each period when the balance is updated. • *Balance Period*. When you want workers to be able to sell the maximum quantity of time off during the entire balance period.
Sell Increments	Select the multiples in which you want workers to sell time off. Example: When you set the sell increment to 8, workers can only sell time offs in multiples of 8, such as 16 and 24.

c) On the **Time Off Plan Overrides** tab, enter a lower limit to define the minimum balance a worker needs to maintain after they sell time off.

Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area.

3. Access either the **Create Time Off Plan** or **Edit Time Off Plan** task. See: Create Time Off Plans That Track Balances on page 2126.

   On the **Time Off** tab, link your time off to a worker-based time off plan.

4. (Optional) Create Segment-Based Security Groups.

   Configure the *Access Time Off (Segmented)* security policy in the Time Off and Leave functional area. When you configure segmented security for workers, they can only sell the time offs that they have access to.

5. Edit Business Process Security Policies.

   a) Select *Time Off and Leave* as the functional area and *Sell Time Off* as the business process.
   b) Edit permissions to determine the security groups:

      - For the *Sell Time Off* initiating action.
      - That can view all, approve, or deny sell time off requests for workers.

6. Edit Business Processes.

   Configure a default definition for the *Sell Time Off* business process.

7. (Optional) Set Up Worklets.

   Add the **Sell Time Off** task to 1 or both of these worklets:

   - **Absence**
   - **Time Off**

8. (Optional) Access the **Configure Profile Group** task.

   Add the **Time Off Sold** tab to the worker profile.

   a) From the **Profile Group** prompt, select *Time Off for Worker Profile*.
   b) In the **Report** column in the grid, select *Time Off Sold* to display the **Time Off Sold** tab on the worker profile.

   Security: *Set Up: System* domain in the System functional area.
9. (Optional) Create Custom Labels.

   Create a custom label for sell time off. You can't use custom labels to update the names of setup tasks. Example: **Create Time Off**.

Result

Workers can sell time off by accessing the **Sell Time Off** task from the:

- **Absence** or **Time Off** worklets.
- **Time and Absence** related actions of their worker profile.
- **Time Off Balance** and **Time Off Sold** tabs on the **Time Off** section of their worker profile.

They can also access the task on their mobile devices (Android, iPhone, and iPad) from their worker profile:

- **Time and Absence** related actions menu.
- **Time Off Sold** tab on the **Time Off** section.

Next Steps

You can review details of time offs sold by workers with the:

- **Maintain Accrual and Time Off Adjustments/Overrides** task.
- **Time Off Sold by Workers** report.

Related Information
Tasks

Create Time Off Plans That Track Balances on page 2126

Adjust Time Off for Worker on page 2252

Examples

2023R2 What's New Post: Sell Time Off

2024R2 Feature Release Note: Sell Time Off Reporting

Concept: Sell Time Off

Your workers can use Sell Time Off to sell back a portion of their accrued time off.

Worker Experience

Workers can access the **Sell Time Off** task from the:

- Search.
- **Absence** or **Time Off** worklets.
- **Time and Absence** related actions of their worker profile.
- **Time Off Balance** and **Time Off Sold** tabs on the **Time Off** section of their worker profile.

They can also access the **Sell Time Off** task on their mobile devices (Android, iPhone, and iPad) from their worker profile:

- **Time and Absence** related actions menu.
- **Time Off Sold** tab on the **Time Off** section.

Workers can select a time off type and enter the time off quantity they want to sell. When workers submit their sell time off requests, Workday routes the event for approval based on how you set up the *Sell Time Off* business process.

You can also set up the business process to autocomplete.

On the **Sell Time Off** task, workers can consider:

Option	Description
Type of Time Off	Defaults to the time off that workers are eligible to sell when there's only 1 time off. When workers are eligible to sell more than 1 time off, they can select a time off type. Displays when: • You configure the time off for Sell Time Off. • The time off is linked to a time off plan. • The time off is available for workers to sell. • The time off is in the time frame of your sell schedule.
Hours or Days	Workers can enter the time off quantity they want to sell. Workday displays the label as either **Hours** or **Days** based on the unit of time defined on the time off plan.
Comments	Workers can enter comments if you enable it on the *Sell Time Off* business process security policy.

When workers sell their time off, they can view details of the time off sold on the:

- **Time Off Balance** and **Time Off Sold** tabs on the **Time Off** section of their worker profile.
- **View Time Off** related actions of their worker profile.

Reporting

You can run the **Time Off Sold by Workers** report to monitor the type and quantity of time offs sold by all workers across 1 or more organizations within a selected date range.

You can also view details of time off sold by workers on the **Buy and Sell Time Off Adjustments** tab on the **Maintain Accrual and Time Off Adjustments/Overrides** task. Details include the time off type, the quantity of time off the worker sells, the date and the period in which Workday updates the time off balance with the time off sold, and a link to the sell time off event details. Workday only displays events in approved or completed status in the grid.

Related Information
Examples

2023R2 What's New Post: Sell Time Off

2024R2 Feature Release Note: Sell Time Off Reporting

Time Off Adjustments

Setup Considerations: Time Off Adjustments

You can use this topic to help make decisions when planning your configuration and use of time off adjustments. It explains:

- Why to set them up.

- How they fit into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Time off adjustments enable you to change time off plan balances for a worker during a single processing period.

Business Benefits

- Provides flexibility by enabling you to reduce or increase time off balances for workers in exceptional circumstances and update payroll with the latest information automatically.
- Makes it easier to track time off in lieu.

Use Cases

With time off adjustments, you can:

- Adjust a worker’s balance for sick leave or compassionate leave time offs.
- Record time off retroactively if the worker or manager didn't request it in Workday.
- Use time off adjustments to offset an automated termination adjustment.
- Suspend time off limits for workers.

Questions to Consider

Question	Consideration
Which time offs and time off plans do you want to adjust?	You can only adjust time offs for plans that track balances. You can specify adjustments in hours or days, based on the units of the time off plan. You can only adjust time offs that allow adjustments.
When do you want to enter your adjustments?	The timing of accrual processing can reduce or eliminate a time off adjustment. Whether Workday records the adjustment as paid time off depends on: • When accrual processing occurs. • Whether the time off balance exceeds the time off lower limit at the time of processing. You can configure accrual processing to occur based on: • The start or end of the period. • A custom frequency. • A scheduling rule.
Does your time off have a lower limit set?	Time off limits can reduce or eliminate a time off adjustment. Example: A Paid Time Off plan has a lower limit of zero hours. Joan has an accrual balance of 9 hours and takes off 6 hours. If you enter a time off adjustment of 5, Workday records

Question	Consideration
	only 3 adjusted hours as paid time off, because any amount over 3 hours exceeds the time off lower limit. You need to consider time off lower limits together with validations on the time off such as **Maximum Unpaid Time Off Units Allowed**. If there's no unpaid days validation on the time off, time off adjustments can result in a negative time off balance.
Do you use absence tables?	You can use an absence table to group time off requests that span multiple related time offs. Workday doesn't re-evaluate time off balances or time off events in absence tiers automatically when you adjust time offs. However, you can manually recalculate a worker's or multiple workers' balances.
Does the time off span multiple periods?	You can adjust time offs and accruals for any period, including periods for which a worker is ineligible. You can't, however, configure time off adjustments that span multiple periods. If you want to adjust a time off for multiple periods, you need a separate entry for each period. A time off adjustment adds to or subtracts from the time off units of a worker for a single processing period. By contrast, an override replaces the standard accrual calculation with the override units and can span more than 1 processing period. You can't override individual time offs. Overrides apply to accruals only.
When do you want to include the adjustment in your time off calculations?	You can select any reference date within the selected period. Workday updates balances dynamically after you make adjustments.
Do want to run retroactive pay processing for a period you're adjusting?	If you use Workday Payroll, when you enter a time off adjustment for a prior period and run retro processing, Workday Payroll picks up the adjustment and retroactively updates the employees pay.
Do you know whether the worker is eligible for the time off adjustment you want to make?	Before making an adjustment, you can: • Test whether the worker is eligible for a time off using the **Evaluate Absence Eligibility** report. • Check the worker profile and compare the worker data with the eligibility rules to identify any discrepancies.
Do you need to adjust time off balances for workers who relocate to a different country or region?	When workers relocate, their eligibility for time off plans might change. You can configure time off plans to transfer their balances to another time off plan, pay out time off balances, or both when they lose eligibility due to a job change.

Question	Consideration
	Transfer balance payouts create time off adjustments for the worker. You can edit the reference date on the time off adjustments to change the country or pay results for the payout.
Do you need to adjust time off balances for multiple workers?	To adjust time off balances for multiple workers, you can link adjustments to batch IDs created using the *Put Absence Input* web service. Batch IDs enable you to manage time off adjustments for multiple employees at the same time. You can also delete adjustments that you make in error.

Recommendations

For optimum performance, Workday recommends that:

- When running the **Recalculate Worker Time Off Balances** task, don't select all workers, all time off plans, or a start date more than 13 months before the current date.
- Schedule bulk recalculations to run at night or during off-peak hours.

Requirements

Enable the **Adjustments Allowed** option for the time off.

Limitations

- Because absence tiers re-evaluation doesn’t occur automatically after a time off adjustment, if you adjust time offs that are part of an absence table, you'll need to re-evaluate the tiers. To reduce the likelihood of impacting existing time off events, we recommend that you don't make time off adjustments for absence table time offs retrospectively.
- You can configure a time off as the one to use for termination adjustments to offset the plan balance at termination. However, Workday doesn't process balance adjustments of greater than 1000 units.

Tenant Setup

No impact.

Security

Configure these domains in the Time Off and Leave functional area:

Domain	Consideration
Process: Calculated Balances (Run)	Users with access to this domain can run calculated balances process for a time off plan for a specific start date.
Set Up: Time Off (Calculations - Absence Specific)	Users with access to this domain can define absence-specific calculations such as: • Accruals. • Time offs. • Time off plan balances. They can also define: • Balance periods used within accruals and time off plans.

Domain	Consideration
	• Periods and their schedules.
Worker Data: Time Off (Adjustments and Overrides)	Users with access to this domain can adjust time off for workers.
Worker Data: Time Off (Limit Overrides)	Users with access to this domain can suspend time off limits for workers.

Business Processes

Business Process	Consideration
Correct Time Off	Enables users to adjust time off for a worker.
Change Job	Workday recommends that you add an *Automated Time Off Adjustment* Service step after the *Completion* step to the *Change Job* business process.
Termination	Enables users to adjust time off balances for terminated workers. Workday recommends that you add an *Adjust Time Off Balances* service step after the completion step of the *Termination* business process.
Time Off Balance Transfer	This subprocess enables the transfer of a time off balance to another plan when a worker's eligibility changes.

Reporting

Reports or Dashboards	Consideration
Time Off Balances and Liability by Organization	You can view your liability for employees' time off plan balances as of a specific date before deciding which time offs you need to adjust.
Accrual and Time Off Adjustments/Overrides	Find out what adjustments and overrides you've made to time offs for organizations within a specified time period.
Accrual and Time Off Adjustments/Overrides by Batch ID	View a batch of time off adjustments and overrides that you made for multiple workers using the *Put Absence Input* web service. You can use a batch ID to identify the batch.
Time Off Balance	View time off balances for a worker before determining whether to make an adjustment.

You can use these data sources to create custom reports:

Data Source	Consideration
Accrual and Time Off Adjustments/Overrides	This data source doesn't include terminated workers, so custom reports that use this data source won't display workers with terminated adjustments.

Data Source	Consideration
Workers for Organizations parm for Time Off Liability Reporting	Use this data source to view the liability of an organization for time off balances and decide where you might need to make time off adjustments.

Integrations

Web Service	Consideration
Put Absence Input	Use this web service to load time off adjustments or updates to existing adjustments for workers into Workday. You can use batch IDs to bulk load adjustments for multiple workers.
Get Absence Inputs	Use this web service to extract time off adjustment details for workers from Workday.

Connections and Touchpoints

Touchpoint	Consideration
Time Tracking	You can adjust time off entered.
Workday Payroll	Adjustments that you make can affect payroll earnings that are based on a worker's time off.
Third-party payroll	Third-party payroll interfaces can detect time off adjustments that affect payroll earnings.

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information
Concepts

Setup Considerations: Time Off Plans on page 2084
Setup Considerations: Time Off on page 2092
Setup Considerations: Absence Tables on page 2257
Setup Considerations: Accrual Adjustments and Overrides on page 2288

Tasks

Create Time Off Plans That Track Balances on page 2126
Steps: Create a Time Off on page 2104
Create Time Off Validations on page 2122
Evaluate Absence Eligibility on page 2424
Recalculate Balances for Workers on page 2315
Steps: Transfer Time Off Balances on page 2305

Adjust Time Off for Worker

Prerequisites

- Enable the **Adjustments Allowed** option for the time off.
- Security: *Worker Data: Time Off (Adjustments and Overrides)* domain in the Time Off and Leave functional area.

Context

Adjust the time for a worker during 1 processing period. Before making an adjustment, review their current time off plan balance on the **Time Off Balance** report.

- If the worker isn't eligible, Workday processes the adjustment only if you modify the time off eligibility criteria.
- Time off limits and the timing of accrual processing can reduce or eliminate an adjustment.

  You can use the **Maintain Accrual and Time Off Limit Overrides** task to suspend time off limits for an employee.

You can also use the *Put Absence Input* web service to adjust time off.

Steps

1. Access the **Maintain Accrual and Time Off Adjustments/Overrides** task.
2. Search for the worker.
3. On the **Adjustments** tab, specify:

Option	Description
Select Accrual/Time Off	The time off to adjust, such as *Sick Time Off*. The prompt automatically displays the time offs the worker is eligible for. Alternatively, you can select from the **Absence Accruals and Time Off Worker Ineligible** folder. **Note:** Workday processes the adjustment if you modify the time off eligibility criteria for workers that are ineligible.
Units	The number of hours or days for the adjustment. A positive number reduces the time off plan balance. A negative number increases the plan balance and can be useful if you need to offset an automated termination adjustment.
Period	The period to adjust. The prompt automatically displays periods associated with the time off plan that includes the time off. Time off adjustments can't span multiple periods. To select a period for which the worker is ineligible for the time off, select from the **All Periods for Start Period** folder.
Reference Date	Determines when to include the adjustment in time off calculations. You can select any date in the **Period**. Balances reflect the adjustment if you calculated on or after the reference date. Example: The period is February 1 to 28. If the reference date is February 18, time off balances displayed on or after that date reflect the adjustment.
Position	Applies only if the time off is associated with a position-based time off plan.

Option	Description
Batch ID	You can link the adjustment to a batch ID created using the *Put Absence Input* web service. Batch IDs enable you to manage time off adjustments for multiple employees at the same time.

4. If adjusting a time off for which the worker or position isn't eligible, modify the time off eligibility.
   a) Access the **Edit Time Off Plan** task or the **Edit Time Off** task, depending on where you defined eligibility for the time off.
   b) Add this Workday-provided calculation to the eligibility rules: *Absence Input (Period-Specific) Exists for the Job for Absence Component.*

      This rule works for both worker-based and position-based time off plans. For position-based plans, Workday looks for input for the position.

      Add the calculation on a separate row.
5. (Optional) Access the **Delete Accrual and Time Off Adjustments/Overrides by Batch ID** task to delete.

Example

Adjusting Time Off for a Worker

Adam's time off plan balance is 40, but should be 32. To adjust his time off and have Workday reflect the adjustment when you display balances, complete these fields:

Select Accrual/ Time Off	Units	Period	Reference Date
Vacation Time Off	*8*	*06/01/2011 - 06/30/2011*	*06/15/2011*

Adjusting Time Off for Which a Worker is Not Eligible

Tim transfers to a new organization and loses eligibility for time off. To eliminate and pay out his remaining time off balance of 32 hours:

1. Use the **Edit Time Off Plan** task to enter a worker eligibility override that uses the calculation *Absence Input (Period Specific) Exists for the Job for Absence Component*.
2. Use the **Maintain Accrual and Time Off Adjustments/Overrides** task to enter a time off adjustment for 32 hours in the current period.

Next Steps

Use these reports to view time off adjustments:

- **Accrual and Time Off Adjustments/Overrides**. View for a selected organization.
- **Accrual and Time Off Adjustments/Overrides by Batch ID**.

Access the **Delete Accrual and Time Off Adjustments/Overrides by Batch ID** task to delete time off adjustments, accrual adjustments, and overrides.

Related Information

Concepts

Concept: Termination Adjustments on page 2255

Concept: Accrual and Time Off Limits on page 2176

Tasks

Steps: Set Up Sell Time Off on page 2244

Steps: Create a Time Off on page 2104

Create Time Off Plans That Track Balances on page 2126

Concept: Termination Adjustments

Workday generates a termination time adjustment for employees upon their termination. It sets the remaining time off plan balance to zero. The adjustment takes into account time offs, accruals, and any other adjustments for dates on or before the termination date.

To generate termination adjustments, specify a time off plan to use for the adjustments and include a step in the *Termination* business process.

Note: To receive a termination adjustment, an employee must meet eligibility requirements for the time off plan, its accruals, and the adjusting time off on the termination effective date. Workday doesn't process balance adjustments of greater than 1000 units.

Viewing Termination Adjustments

You can view a worker's termination adjustment after the service step from the Termination Business Process runs. Use the termination adjustment to calculate how much paid or unpaid time off the worker has.

You can use the **Adjustment** tab of the **Maintain Accrual and Time Off Adjustments/Overrides** page to view the termination adjustments.

The **Reference Date** column displays the termination date. You can view the worker's termination adjustment details. Workday hides termination adjustments from employees until the day after their termination date. Employees continue to see their unadjusted balances and can request time off as before. They won't receive validation errors if their plan balance is too low to cover requests because of a termination adjustment.

Managing Termination Adjustments

Workday updates termination adjustments in response to certain events that happen after you create an adjustment.

You can't update a termination adjustment directly. You can use the **Adjustment** tab of the **Maintain Accrual and Time Off Adjustments/Overrides** page to enter a time off adjustment to offset the termination adjustment.

Events that update termination adjustments	• Time off requests or corrections for dates on or before the termination date. • Rescinded terminations. Workday restores the plan balance and removes the **Adjustments** tab from the **Maintain Accrual and Time Off Adjustments/Overrides** page. • Corrections to termination dates. Example: You correct a termination date of October 20 to November 15. Workday updates the termination adjustment for any time off, adjustments, overrides, or accruals between the original and

	the corrected termination dates. Any correction to the termination event triggers a recalculation.
Events that don't update termination adjustments	• Manual adjustments. • Accrual overrides and overrides to time off plan balances entered after a termination adjustment generates. • Requests to take compensatory time off (time off in lieu) entered through Workday Time Tracking.

Related Information
Concepts

Concept: Eligibility for Time Off Plans, Time Off, and Accruals on page 2142

Tasks

Steps: Enable Termination Adjustments for Time Off Plans on page 2110

Adjust Time Off for Worker on page 2252

Examples: Effect of Limits and Accrual Timing on Adjustments and Overrides

Time off limits and accrual limits can reduce or even eliminate adjustments and overrides made to a worker's time off or accrual.

Example 1: Accrual Limits	The Vacation time off plan has an accrual limit of 120 hours. Alex has an accrual balance of 110 hours going into the next balance period. The standard monthly accrual is 12 hours. • If you enter an accrual adjustment of 3 hours, Workday adds only 10 hours to the initial balance of 110. • If you enter an override of 15 hours (instead of the adjustment), Workday still adds only 10 hours to the initial balance of 110.
Example 2: Time Off Limits	The Vacation time off plan has a lower limit of zero hours. Alex has an accrual balance of 5 hours and takes off 4 hours. If you enter a time off adjustment of 4, Workday records only 1 adjusted hour as paid time off, because any time off over 5 hours exceeds the time off lower limit.

Effect of Accrual Timing on Adjustments and Overrides

Example 1: Accrual Adjustments	The Vacation time off plan has an accrual limit of 120 hours. The standard monthly accrual is 10 hours. Alex has an accrual balance of 110 hours going into the next balance period. You enter an accrual adjustment of 2 hours, and Alex requests 12 hours of time off. • If accrual processing occurs at the beginning of the period, Workday adds the 2 hours to the 10 normally accrued, increasing the balance to 122. It applies the limit and determines that the 120 limit is exceeded by 2. Workday reduces the accrual by 2.

- If accrual processing occurs at the end of the period, Workday reduces the accrual balance of 110 by the 12 hours of time off, leaving a remaining balance of 98. It adds the adjustment of 2 for a total of 110, and applies limit testing. The limit isn't exceeded so Alex doesn't lose vacation time.

Example 2: Accrual Overrides

The Vacation time off plan has an accrual limit of 120 hours. The standard monthly accrual is 10 hours. Alex has an accrual balance of 110 hours going into the next balance period. You enter an accrual override of 15 hours, and Alex requests 12 hours of time off.

- If accrual processing occurs at the beginning of the period, Workday adds the 15 hours to the 110 already accrued. It applies the limit and determines that the 120 limit is exceeded by 5. Workday reduces the accrual for the period to 10.
- If accrual processing occurs at the end of the period, Workday reduces the accrual balance of 110 by the 12 hours of time off, leaving a remaining balance of 98. It adds the override of 15 for a total of 113, and applies limit testing. The limit isn't exceeded so Alex doesn't lose vacation time.

Example 3: Time Off Adjustments

The time off lower limit for sick time is zero hours. Sue has a balance of 2 hours going into the current period. She accrues 2 additional sick hours for the period, takes 2 hours off during the period, and you enter a time off adjustment of 4.

- If accrual processing occurs at the beginning of the period, Workday records 2 of the adjusted hours as paid time off. The other 2 hours exceed the time off lower limit.
- If accrual processing occurs at the end of the period, Workday doesn't record the adjustment as paid time off because it exceeds the time off lower limit.

Absence Tables

Setup Considerations: Absence Tables

You can use this topic to help make decisions when planning your configuration and use of absence tables functionality. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

You can use absence tables to group related time offs. Workers requesting absence that spans different time off plans can request a single time off type. Workday automatically selects the appropriate time off for each portion of the absence.

Business Benefits

Absence tables increase efficiency by:

- Reducing the number of time off requests a worker needs to make.
- Consolidating the number of times off types a worker can select from.
- Reducing multiple time off request approvals for managers.

Use Cases

You can use absence tables to manage absences that have different pay rates over their duration, such as:

- Parental leave.
- Sick leave.

You can also create an absence table to manage time off requests that span multiple time off plans. Example: When you create an absence table that includes floating holiday and vacation time off plans, workers requesting time off don't have to specify a plan.

Note: Users can request time off against absence tables on mobile. Workday supports absence tables on Android, iPad, and iPhone, enabling you to manage time off requests that span multiple absence tiers.

Questions to Consider

Question	Considerations
How do you use multiple time off plans to manage 1 absence type?	You can create an absence table for the absence type. You can then set up absence tiers using new or existing time off plans to manage the absence type.
How do you set up time off plans that workers can use when they exhaust the balance of another time off plan?	You can create an absence table with a tier for each time off plan. You can assign a higher priority to the time off plan that you want the worker to use first. The request moves to the next tier with available balance when it exhausts the balance of the current tier.
How do you manage absences that have varying pay rates over time?	You can create an absence table with a tier for each rate of pay. You can then configure your payroll to apply the appropriate rate of pay to each time off tier.
How do you manage waiting periods for sickness?	You can set up waiting period tiers with quantity-per-occurrence calculations to ensure that a certain quantity of time off units for sickness is unpaid or at a different pay rate whenever there's a new absence occurrence.
How do you manage future time off requests using absence tiers?	Tier reevaluation enables Workday assess new time off requests and ensure that tier

Question	Considerations
	balances reduce chronologically. Workday runs a reevaluation job that automatically identifies and corrects future-dated absence-table event records, based on newly entered, or the correction of existing, absence table events. Workday uses the balances of tier time off plans in priority order of the absence table tiers. The reevaluation job triggers when the *Request Time Off* and *Correct Time Off* business processes complete and in response to time off events against absence tables where there are future-approved absence table events. These time off events include: • Requests and corrections against an absence table. • Corrections against a standard time off that's on an absence table. • Cancellations. • Deny requests. When you set up absence tables, you should consider the effective dates of absence table objects. Absence tables don't have effective dates. However, tier time off plans set up within an absence table include effective-dated time off plans and time off events. The effective date of these objects can impact when related tiers become effective and available for use in absence requests and balance visibility.
Which absence types do you want to group in an absence table?	You can group absence types that use the same unit. To request an absence based on an absence table, a worker must be eligible for at least 1 tier plan. When a worker is eligible for some but not all tiers, Workday deducts time off from tiers they're eligible for.
How do you want to alert workers when they enter an invalid request?	You can create validation messages that display when workers attempt to enter an absence that doesn't meet your configurations. You can add these validations to your absence tables: • Increments • Maximum • Minimum You can prevent workers requesting unpaid absence by setting the *Maximum Unpaid Time Off Units Allowed* validation on each time off tier.
How do workers enter time off requests for all days of the week?	Absence tables use the **Days to Include** configuration on each tier time off plan. Example: You set **Days to Include** to Monday to Friday on tier 1 but to all days on tier 2. Time off requests that include Saturday use the balance from tier 2.

Recommendations

Workday recommends that you always enable Workday to identify and correct absence events automatically. So, for all new absence tables that you create, the **Enable Reevaluation** check box is selected by default.

Set the **Daily Quantity Default** in the time off plan of the first tier to the value that you want to use in the absence table. The remaining tiers in your absence table use this value automatically.

Lower limits and the *Maximum Unpaid Time Off Units Allowed* validation ensure that workers exhaust the balance of one time off plan before using another, except when you configure **Quantity per Occurrence** values.

Select time off plans that use the same period schedule and balance period.

If adding quantity-per-occurrence calculations on existing absence tables that aren't already enabled for absence occurrences, add the calculations before enabling the tables for occurrences. This approach helps avoid unnecessary recalculation of new occurrences.

Note: Adding quantity-per-occurrence values on absence tables that already have related time off entries doesn't change the existing tier splitting. Workday only applies the values to new time off entries against the absence table, or when running table reevaluation.

Requirements

Set up or reuse existing time off plans for each tier of your absence table. Each time off plan must:

- Track balances.
- Use the same time unit.

Limitations

- You can't enter start and end times against absence table requests on the legacy absence and time off calendars. You need to set up Absence Calendar Experience to enable start and end times on absence tables.
- You can't add intermittent time offs to an absence table. Intermittent time offs subtract from the leave balance without having the employee on a leave through the *Request Leave of Absence* business process. When creating or editing absence tables, Workday provides a validation that prevents you adding intermittent time offs. When creating or editing leave types, Workday provides a validation that prevents you adding time offs as intermittent time offs if they're already in use on an absence table.
- Validations for an individual time off don't display when you use that time off in an absence table, except for the *Maximum Unpaid Time Off Units Allowed* validation.
- Period-based calculations aren’t available for validations on absence tables.
- You can't use effective dates with absence tables. You can enter effective dates on tier time off plans.
- Workers can't request against a time off type after you add it to an absence table. Their subsequent time off requests are against the absence table. You can override the tier order of absence requests.

Tenant Setup

Access the **Edit Tenant Setup - HCM** task to enable quantity per occurrence on absence table tiers.

Security

Users with security enabled for the *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area can view, edit, and create absence tables.

Business Processes

You can update entry condition rules that you use for business process validations to include the **Absence Table or Time Off for Time Off Event** report field.

Reporting

Reports	Considerations
All Absence Tables	View all absence tables in your tenant and their related time off plans.
Absence Tier Time Off Entry Details	View absence tier usage by worker time off requests. You can also use the report to confirm that tier priority is working correctly. The report indicates reevaluated events.
View Absence Table	View detailed information for a specific absence table, including its related absence table tiers and validations.

You can add the **Time Off/Absence Table** report field from the *Coordinated Time Off Entry* business object to your existing custom reports to view absence table usage.

Integrations

You can use these web services to add, adjust, or bulk upload time off requests to absence tables:

- *Adjust Time Off*
- *Enter Time Off*
- *Import Time Off Request Event Batch*

Connections and Touchpoints

Product	Touchpoint
Payroll	Create separate earnings and deductions for each time off plan that you use in your absence table.

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information
Tasks

Steps: Set Up Absence Third-Party Calendar Integration

Reference

2025R1 Feature Release Note: Start and End Times on Absence Tables

Create Absence Tables

Prerequisites

Review setup considerations for absence tables.

Configure time off plan and time offs. You can also configure new plans and time offs directly from the task. For each:

- Time off plan, set the **Time Off Plan Balance Lower Limit** on the **Calculation** tab. Workday uses this value to determine when to move to another tier. You don't have to set this calculation for the final tier if the plan used is unpaid.
- Time off, add the *Maximum Unpaid Time Off Units Allowed* validation to the **Data Entry Validations** section on the **Validations** tab. This validation helps calculate when to change tiers.

Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area.

Context

You can create an absence table to manage time off requests that span multiple time off plans. You create a tier for each unique time off plan and time off combination, and assign a priority to each tier of the table. Workday evaluates eligibility settings, validations, and balances to determine which tier to use when satisfying the time off request.

Example: Your U.S. time off and leave package includes both a floating holiday and a vacation time off plan. Workers must use their floating holidays before vacation days. As the absence administrator, you create an absence table with 2 tiers:

- Tier 1: Floating holiday time off plan.
- Tier 2: Vacation time off plan.

You assign the higher priority to Tier 1. When a worker requests time off against the absence table, Workday processes time off entries against the Tier 1 balance until the worker exhausts the balance. Workday then jumps to Tier 2 to process the rest of the request.

Steps

1. Access the **Create Absence Table** task.

   Workday recommends that you always enable Workday to identify and correct absence events automatically. So, for all new absence tables that you create, the **Enable Reevaluation** check box is selected by default.

   Note: You can't clear the **Enable Reevaluation** check box to deactivate table reevaluation when the absence table is in use and has an approved, sent back, or submitted request against it. However, you can enable it.

   Reevaluation:

   - Occurs in response to the completion of business process events, such as *Absence Calendar*, *Request Time Off*, *Correct Time Off*, and *Enter Time*, for new time off entries or corrections.
   - Doesn't occur upon entry or amendment of any time off, accrual adjustments, or overrides.

   When you enter time off requests or correct entries, reevaluation updates absence table events that occur on or after the time off requests or corrections. Example: Today is 02-11-2022 and a worker has a time off entry against an absence table from 02-07-2022 to 02-11-2022. If the worker enters time off against the table for 02-01-2022 to 02-04-2022, Workday reevaluates the approved time off entries from 02-07-2022 to 02-11-2022.
2. (Optional) Select the **Require Position on Time Off Request** check box to restrict absence table entries to position-based time off plans or worker-based time offs that require a position in the request. Workday updates the prompts in the absence table tiers and the **Validations** tab to restrict the values that you can select based on this option. You can only select or deselect this option when there are no approved entries for the absence table.
3. Add a new tier for each time off plan and unique time off combination.

   Note: You can create as many tiers as you want. However, the more tiers, the more processing, which might impact performance.

   As you complete each tier, consider:

Option	Description
Priority	The alphanumeric entry must be unique for each tier.
Time Off Plan	Select an existing plan or create a new one. All plans in the table must: • Use the same unit of time.

Option	Description
	• Track balances.
Time Offs	Select a unique time off for each tier. Example: Tier 1 and Tier 2 can use the same time off plan, but must each use a different time off. Workday doesn't support intermittent time offs.
Quantity per Occurrence	(Optional) Displays when you enable quantity per occurrence on absence table tiers on the **Edit Tenant Setup - HCM** task. Select a constant value calculation for a static value, or create a calculation to allocate an amount of time off units to the tier per absence occurrence. Example: Create a conditional calculation that allocates time off units based on the results of value comparison calculations. You can use these instance value calculations (IVCs): • **Count of Absence Occurrences Starting in Current Balance Period** • **Count of Absence Occurrences Starting in Prior 12 Months** • **Count of Absence Occurrences in Current Balance Period** See Concept: Absence Tables Conditional Cascading on page 2269.

4. On the **Details** tab, specify whether workers can enter time off against the absence table in Absence Management, Time Tracking, or both. Select an **Entry Option**:
   - *Enter through Time Off Only* (using the **Request Absence** task).
   - *Enter through Time Tracking Only* (using the **Enter Time by Week**, **Enter Time for Worker** (High-Volume Time Entry), or **Enter Time** (Micro-Edit) tasks).
   - *Enter through Time Tracking or Time Off*.
5. (Optional) Select these check boxes when the **Entry Option** is *Enter through Time Off Only*:

Option	Description
Display Start and End Time	To enable workers to enter start and end times for time off requests.
Start and End Time Required	To require workers to enter start and end times on time off requests.

   Note: You need to set up Absence Calendar Experience to enable the start and end times on absence tables. See Setup Considerations: Absence Calendar Experience.
6. (Optional) When all tier plans are hours-based, regardless of the **Entry Option**, select the **Calculate Quantity Based on Start and End Time** check box to prevent workers overriding the number of hours for the daily quantity. This option ensures that:
   - The quantity of time that workers request per day equals the duration of time between the start time and end time.
   - Workday ignores the daily quantity default.

7. On the **Validations** tab, add a row in the table for each validation that you need.

   Values that you enter must be compatible with the unit of time in the time off plan on each absence table tier.

Option	Description
Consecutive Day Maximum	Specify the maximum numbers of consecutive days of time off workers can request. Example: You enter 3 to prevent workers from requesting more than 3 consecutive days of time off.
Minimum	Specify the minimum amount of time off workers can request for each time off entry, not the sum of time off entries each day. Example: Select a constant value, such as 4 hours or 0.5, or a calculation that returns different values for full-time and part-time workers.
Maximum	Specify the maximum amount of time off workers can request. Example: Select a constant value, such as 8 hours or 1 day, or a calculation that returns different limits based on a worker's work schedule calendar, holiday schedule calendar, or both. You can set limits dynamically based on the number of hours the worker is scheduled to work on the time off date. Example: 8 hours Monday, Tuesday, Wednesday, and Thursday, 12 hours on Friday, and zero hours on holidays. Specify whether the maximum applies to: • Each request (*Individual Time Off Entry*). • All time off entries for the same date. • Requests for the same date for the time offs you select in the **Time Off Validation Set** field.
Increments	Specify the increments for entering time off. Example: Select a constant value, such as 4 hours or 0.5, or a calculation that returns different values for full-time and part-time workers.
Hide Default Validation Text	Select to hide the default validation text when a worker enters a time off request if you define custom text on the validation. **Note:** Workday displays the validations from the effective dated snapshot of the time off plan when the worker entered their time off request. Updates in subsequent snapshots don't display.

Result

Workers can select the absence table in their absence request when eligible for 1 or more time off plans in the table.

Example

At Alice's company, workers can request up to 15 days of time off. Alice requests 10 days and selects the *Vacation* absence table. She has these balances:

- Tier 1 balance: zero days.

  The *Maximum Unpaid Time Off Units Allowed* validation on the Tier 1 time off is set to 8 Days.
- Tier 2 balance: 10 days.

Alice can select the absence table because she’s eligible for both time off plans in the table. Workday takes 8 days from the Tier 1 balance because the validation lets Alice take 8 unpaid days. Workday jumps to Tier 2 and takes the 2 final days.

Next Steps

Test whether a worker is eligible for time off plans, accruals, or time offs.

Related Information
Reference

2025R1 Feature Release Note: Start and End Times on Absence Tables

2023R2 What’s New Post: Position-Based Absence Tables

Reevaluate Absence Table Time Off Entries

Prerequisites

Security: *Set Up: Time Off* domain in the Time Off and Leave functional area.

Note: You can only reevaluate and correct approved time off for specific workers if:

- You've permission to correct their time off, based on the *Correct Time Off* business process security policy.
- You're a member of a role-based security group with contextual access for the worker.

Context

You can reevaluate absence table time off entries for workers or organizations manually when:

- You enter time off plan balance overrides or adjustments.
- Their eligibility changes.

When you need to reevaluate absence table time off entries for more than 10,000 workers, Workday recommends that:

- You split the workers or organizations evenly across multiple runs.
- Each run doesn't exceed 10,000 workers.

This table indicates performance testing metrics for reevaluation of absence table time off entries for 10,000 workers.

Time Off Plan Complexity	Example	Average Execution Time
High	A time off plan with a rolling period accrual of 10 days sick leave per year. Workday looks back to each day in the 12-month period for expired accruals and restores them to the employee's balance.	07:03:28

Time Off Plan Complexity	Example	Average Execution Time
Low	A time off plan with no rolling accruals and eligibility rules on the time off plan.	01:43:00

Note: Workday recommends that you use the **Reevaluate Absence Table Time Off Entries** task to reevaluate time off events. Workday will no longer maintain the **Reevaluate Time Off Events** task going forward.

Steps

1. Access the **Reevaluate Absence Table Time Off Entries** task.

   For optimal performance, we recommend that you:

   - Avoid running this task on Fridays due to the Workday Scheduled Maintenance window.
   - Allow the current reevaluation to complete before running the task again.
2. Select either:
   - *Workers*
   - *Organizations*
3. Select 1 or more workers or organizations and the absence table that you want to reevaluate.

   Note: This task only processes time off entries for members of the organizations that you select from the **Organizations** prompt and doesn't include entries for members of subordinate organizations.
4. (Optional) Select an **As Of** date from which to reevaluate absence table time off entries.

   Workday reevaluates as of the earliest time off entry date that's on or after the **As Of** date. When left blank, Workday reevaluates as of the current date.

   Note: If a worker has a termination date in the middle of an absence that's already approved, the time off entries after the termination date need to be removed before the reevaluation can take effect. You can remove a time off entry by correcting the daily or hourly quantity to zero.

Result

Workday generates a notification when the **Reevaluate Absence Table Time Off Entries** task completes.

Related Information
Tasks

Create Rolling Period Accruals on page 2173

Override Time Off Plan Balances on page 2310

Adjust Time Off for Worker on page 2252

Reference

Troubleshooting: Time Off on page 2336

Examples

Example: Define Eligibility for a Time Off Plan on page 2192

Concept: Absence Tiers

When a worker requests time off that spans multiple time off plans, you can group the request into tiers of an absence table. Workday recommends absence tiers if you:

- Use multiple time off plans to manage 1 type of absence.
- Have time off plans that workers can use only when they exhaust the balance of another time off plan.
- Use separate time off plans for different rates of pay.

You can add a tier for each time off plan (tier plan) and a unique time off. You also prioritize the time off tier. In a time off request, the worker can select any absence table name with a tier plan that they’re eligible for. As the worker reports time off, Workday assesses their time off plan eligibility and balances to determine which tier plan to draw from.

Example: Your company provides these sickness entitlements to French workers:

Tier	**Days**	**Entitlement**
1	1-10	100% of salary rate.
2	11-20	50% of salary rate.
3	Additional days	Zero % of salary rate.

You create time off plans for each entitlement and add them to an absence table with 3 tiers using the **Create Absence Table** task. Workday applies the appropriate plan to worker sick time requests based on priority and the worker's available time in each plan.

You can see if a time off request uses an absence table on the **Review Time Off Request** task in their inbox. They can drill down into the amount requested to see which tier plan balance Workday deducts from. You can see if a time off plan is attached to an absence table in the time off plan **Usage** field.

Time Off Validations for an Absence Table

Workday uses these validations for absence table events:

Validation	**Description**
Consecutive Day Maximum	The maximum number of consecutive days a worker can take time off.
Increments	The increments for entering time off.
Maximum	If the worker isn’t eligible for Tier 1, the **Maximum** value from Tier 1 still applies for the request against the absence table. This validation is a data entry that is the maximum number of units you can request against an object. Example: You can request a maximum of 8 hours per day. This applies for any request against the absence table.
Maximum Unpaid Time Off Units Allowed	Workday uses this validation to know when to jump to the next tier. **Note:** Set the **Time Off Plan Lower Limit** so that Workday knows at what point to jump to the next tier.
Minimum	The minimum amount of time a worker can request.

Absence Table Configuration Details

Absence tables must have:

- Consistent **Units** across tiers.
- Unique time offs within the table.
- A unique priority for each tier.
- No active **Reasons** for time offs.
- No intermittent time offs.

Unsupported Time Off Plan Configurations

For time off plans linked to an absence table, Workday doesn’t support:

- Changes to **Unit of Time**.
- Deletion of time offs linked to the absence table.
- Time off reasons.
- Adjustments and overrides for time offs and accruals.

Unsupported Time Off Validations (Suppressed for Processing)

Workday supports these validations at the time off level only. You can't specify these validations on absence tables:

- *Consecutive Day Minimum*
- *Multiple Time Off Requests Not Allowed for Same Date*
- *Time Off Date before Maximum Override Balance Date Not Allowed*

Processing a Time Off Request Against an Absence Table

Workday processes a worker's time off requests against an absence table by cascading through its tiers in priority order, based on:

- Available balance.
- Days to include.
- Eligibility.

For each day in a time off request against the absence table, Workday checks these criteria against each tier time off plan to account for changes that occur during the specified period. Example: You make an effective-dated change to a time off plan configuration, or the worker becomes eligible for a new time off plan and its corresponding accruals.

For time off requests against an absence table:

- The **Include All Selected Days** check box doesn’t display.
- Workday automatically treats the *Restrict Request to Days to Include on Calendar* validation as *True* on all tiers.
- Workday respects **Days to Include** across tiers.

Reports

You can use the **Absence Tier Time Off Entry Details** report that displays all absence table events for an organization within a specified date range.

The **Type** column displays 1 of these absence table names selected in a time off request:

- **My Time Off/Time Off Requests**
- **Time Off and Leave Requests**
- **Previous Time Off Requests**

Manage Absence

For absences on the calendar, Workday:

- Automatically calculates the **Default Daily Quantity** from the first tier.
- Restricts the request to days to include on the calendar for the entire absence table. Example: A worker selects Friday and Saturday, but the absence table uses Monday - Friday. Workday doesn’t display Saturday for **Quantities per Day**.

Absence Tiers Reevaluation

You can enable automatic identification and correction of absence table events based on the input of new, or correction of existing, absence events. The completion of any of these business processes triggers the reevaluation job:

- *Enter Absence*
- *Request Absence*
- *Enter Time Off*
- *Request Time Off*
- *Correct Time Off*

Reevaluation doesn't occur upon entry or amendment of any time off, accrual adjustments, or overrides.

If the events require corrections, the chronological order of absence table events then uses time offs in the prioritized order per absence table tiers.

Example: Betty Liu has a 10-day sickness event against the absence table in February. This event uses the first tier of the absence table, paying Betty 100% of her salary. Betty retroactively enters another sickness event for 10 days in January. The reevaluation job runs to correct the events so that the earlier event uses the absence table tier with the higher priority, in this case, the first tier. The second event uses the second tier, paying Betty 50% of her salary for the February sickness. Both events correct automatically to follow the tier priorities in absence events chronologically.

Select the **Enable Reevaluation** check box on these tasks to enable reevaluation:

- **Create Absence Table**
- **Edit Absence Table**

The **Absence Tier Time Off Entry Details** report displays reevaluated events with links back to the triggering events.

Conditional Cascading
Concept: Absence Tables Conditional Cascading

When workers request time off that spans multiple time off plans, you can group the request into tiers of an absence table. Each tier comprises a different time off plan, but all tiers manage the same type of absence. You can configure conditional cascading on absence tables to allocate a quantity of time off units per tier based on absence occurrences. This feature helps you to support regulatory requirements such as waiting periods for time off due to sickness. Example: You set up a waiting period tier to delay payment until employees use a certain number of time off units at the beginning of each new absence occurrence.

Allocating units to tiers based on absence occurrences:

- Removes balance period restrictions.
- Reduces the need for manual adjustments and time off data corrections.

To use this feature, you must:

- Enable quantity per occurrence on absence table tiers on the **Edit Tenant Setup - HCM** task.
- Configure absence occurrences, selecting the **Enable for Absence Occurrences** check box beside each absence table that applies.

  Note: This feature doesn't apply to absence tables that are part of a custom type.

You can use the **Quantity per Occurrence** value on tiers to configure a numeric calculation that:

- Determines when to cascade to the next tier.
- Overrides any **Maximum Unpaid Time Off Units Allowed** validations and available time off plan balance on individual tiers.

You can enter an amount, or select conditional calculations based on the number of absence occurrences:

- In the current balance period.

- Starting in the current balance period.
- Starting in the prior 12 months.

The **Quantity per Occurrence** value on a tier takes precedence over the available balance for the tier. Workday doesn't apply:

- **Maximum Unpaid Time Off Units Allowed** validation on tiers that have a **Quantity per Occurrence** value.
- **Quantity per Occurrence** values when you disable occurrences for an absence table.

Reevaluation

Workday reevaluates absence table tiers and quantity-per-occurrence values when corrected or revised time off requests either:

- Join with existing entries into an absence occurrence.
- Split occurrences.

Revaluation can affect how Workday splits time off units for existing entries against absence tables with **Quantity per Occurrence** values. When a scheduled job recalculates flagged absence occurrences, Workday reevaluates the absence table for impacted time off entries.

You can configure Workday to automatically reevaluate absence tables by selecting the **Enable Reevaluation** check box on 1 of these tasks:

- **Create Absence Table**
- **Edit Absence Table**

Workday doesn't run absence table reevaluation on absence table entries when:

- The table is part of a custom occurrence type.
- You trigger the recalculate absence occurrences job using either the **Configure Absence Occurrences** or **Recalculate Absence Occurrences** task.

Reports

When workers access these reports and time off entry options, Workday supports balance-splitting time off units between absence table tiers, based on **Quantity per Occurrence** values:

- **Correct Absence**
- **Correct My Time Off (Mobile)**
- **Correct Time Off**
- **Enter Absence**
- **Enter Time**
- **Enter Time by Week**
- **Enter Time Off**
- **High-Volume Time Entry**
- **Request Absence**
- **Request Time Off**
- **Revise Time Off**
- **Revise Time Off Correction**
- **Time Off (Mobile)**

You can view quantity-per-occurrence values for individual tiers on the **All Absence Tables** report. Workday displays the **Absence Table Tier Quantity per Occurrence** column:

- Only when there's a tier with a calculation in this field.
- Regardless of the **Enable Quantity per Occurrence on Absence Table Tiers** tenant setting.

When workers correct, enter, request, or revise time off against an absence table, Workday:

- Uses all of the quantity-per-occurrence value on a tier before using any balance from the next tier.
- Displays the number of units for each tier on the **Absence Tier Time Off Entry Details** report.

When workers exhaust their balance midway through a request for a day, Workday splits the balance over the quantity per occurrence and the next available tier. Example: *Tier A* has a **Quantity per Occurrence** value of 4 hours. When a worker requests 8 hours for a specific day against an absence table, Workday splits the balance and allocates 4 hours to *Tier A* and 4 hours against the next available tier.

Related Information
Concepts

Setup Considerations: Absence Tables on page 2257

Concept: Absence Tiers on page 2266

Tasks

Create Absence Tables on page 2261

Configure Absence Occurrences on page 2414

Reference

Reference: Edit Tenant Setup - HCM

Conditional Cascading Examples

Example: Count Absence Occurrences Starting in the Current Balance Period

This example illustrates how to create a calculation for a quantity-per-occurrence value on an absence table tier. The calculation counts absence occurrences that start in the current balance period and match the absence table type. Workday uses the result to determine the quantity of time off units to allocate to the tier.

Context

Global Modern Services applies different waiting periods to paid sick time off plans depending on the country. Their *USA Sick Time Off* absence table configuration includes a waiting period tier called *Waiting Period Plan 1*. Workday uses the **Quantity per Occurrence** value to allocate time off units to the waiting period tier for each request. Each tier in the absence table includes an hours-based plan. You create the time offs, time off plans, and *USA Sick Time Off* absence table:

Priority	Absence Tier Plan	Time Off Plan Balance	Time Off Plan Balance Lower Limit	Time Off Name	Maximum Unpaid Time Off Units Allowed	Days to Include	Accrual per Period
1	*Waiting Period Plan 1*	*0*	*0*	*Time Off A*	*None*	*Workdays (Non-Holiday)*	*0*
2	*Time Off Plan 2*	*4*	*0*	*Time Off B*	*0*	*Workdays (Non-Holiday)*	*4*
3	*Time Off Plan 3*	*4*	*0*	*Time Off C*	*None*	*Workdays (Non-Holiday)*	*0*

You're preparing to configure the **Quantity per Occurrence** value. You want to create a conditional calculation that allocates time off units based on the results of value comparison calculations. If the count is:

- *1*, the quantity is *3*.
- *2*, the quantity is *4*.

- Greater than or equal to *3*, the quantity is *5*.

Otherwise, the quantity is zero. Each of these calculations uses the **Count of Absence Occurrences Starting in Current Balance Period** instance value calculation (IVC).

Prerequisites

Create the absence table, leaving the **Quantity per Occurrence** fields empty.

Create and assign calendars.

Set up absence occurrences.

Enable quantity per occurrence on absence table tiers on the **Edit Tenant Setup - HCM** task.

Security:

- *Set Up: Payroll (Calculations - Generic)* domain in the Core Payroll functional area.
- These domains in the Time Off and Leave functional area:
  - *Set Up: Time Off (Calculations - Absence Specific)*
  - *Set Up: Time Off (Calculations - Generic)*
  - *Worker Data: Time Off (Time Off)*
  - *Worker Data: Time Off (Time Off Manager View)*

Steps

1. Create the value comparison calculations.

a) Access the **Create Value Comparison Calculation** task and enter:

Field	Value
Name	*If count = 1 starting in current balance period*
Category	*Absence*
Comment	*True if the count of absence occurrences for the absence type in the current balance period is equal to 1.*
1st Operand	*Count of Absence Occurrences Starting in Current Balance Period*
Operator	*equal to*
2nd Operand	*1*

b) Click **OK** and **Done**.

c) Access the **Create Value Comparison Calculation** task and enter:

Field	Value
Name	*If count = 2 starting in current balance period*
Category	*Absence*
Comment	*True if the count of absence occurrences for the absence type starting in the current balance period is equal to 2.*
1st Operand	*Count of Absence Occurrences Starting in Current Balance Period*
Operator	*equal to*

Field	Value
2nd Operand	*2*

d) Click **OK** and **Done**.

e) Access the **Create Value Comparison Calculation** task and enter:

Field	Value
Name	*If count >= 3 starting in current balance period*
Category	*Absence*
Comment	*True if the count of absence occurrences for the absence type starting in the current balance period is greater than or equal to 3.*
1st Operand	*Count of Absence Occurrences Starting in Current Balance Period*
Operator	*greater than or equal to*
2nd Operand	*3*

f) Click **OK** and **Done**.

2. Create a conditional calculation for the **Quantity per Occurrence** value for a time off type starting in the current balance period.

a) Access the **Create Conditional Calculation** task and enter:

Field	Value
Name	*Quantity Based on Count Starting in Current Balance Period*
Category	*Absence*
Comment	*If count = 1 then 3* *If count = 2 then 4* *If count >= 3 then 5* *Else 0*
Default Response	*0*

b) Add these rows to the **Calculation**:

Order	Condition	Result
a	*If count = 1 starting in current balance period*	*3*
b	*If count = 2 starting in current balance period*	*4*
c	*If count >= 3 starting in current balance period*	*5*

c) Click **OK** and **Done**.

3. Add the calculation to the absence table tier.
   a) Access the **Edit Absence Table** task and select the *USA Sick Time Off* absence table.
   b) In the **Quantity per Occurrence** column for the *Waiting Period Plan 1* absence tier plan, select *Quantity Based on Count Starting in Current Balance Period*.
   c) Click **OK** and **Done**.

Result

You can access the:

- **View Absence Occurrences Summary** report to find out how many occurrences workers have that start within the period for which they're requesting time off.
- **Absence Tier Time Off Entry Details** report to review how Workday splits the units by absence table tier, based on the quantity-per-occurrence calculation.

Tier Allocation

Seth requests 5 hours time off on Tuesday (2021-01-12), using the *USA Sick Time Off* absence table. Alison, Seth's manager, accesses the:

- **View Absence Occurrences Summary** report after approving the request. She can see that Seth currently only has 1 absence occurrence.
- **Absence Tier Time Off Entry Details** report. She can see that for Seth's time off request, Workday allocates 3 hours to the tier time off for the waiting period (*Time Off A*) and 2 hours to *Time Off B*.

Seth then retroactively requests 5 hours of time off for both Thursday (2020-12-31) and Monday (2021-01-04). Workday treats it as a single occurrence starting in the previous balance period. As the IVC only applies to the current balance period, Workday allocates:

- 3 hours to *Time Off A* and 2 hours to *Time Off B* for Thursday.
- 2 hours to *Time Off B* and 3 hours to *Time Off C* for Monday.

Seth also requests 5 hours time off on Wednesday (2021-01-13), using *USA Sick Time Off*. Workday displays an error message that prevents Seth completing the request due to an insufficient balance.

Seth discards the request and instead requests 5 hours time off on Thursday (2021-01-14). There's now a day between the requests, so Workday separates the occurrence allocating 4 hours to *Time Off A* and 1 hour to *Time Off C*.

Alison reminds Seth to log a request of 5 hours for time off taken on the previous Friday (2021-01-08).

After Workday runs a reevaluation job, the time off request on Friday becomes the first occurrence based on the IVC. Workday reevaluates the time off units for the requests and allocates for Friday (2021-01-08):

- 3 hours to *Time Off A*
- 2 hours to *Time Off B*.

As part of a correction event for the 5-hour request on Tuesday (2021-01-12), Workday:

- Adds 1 hour to *Time Off A* because Tuesday becomes the 2nd occurrence. The original allocation value changes from 3 to 4.
- Allocates the remaining 1 hour for the request to *Time Off C*.
- Deducts 2 hours from *Time Off B* as the request for Friday exceeds the tier balance of 4.

As part of a correction event for Thursday (2021-01-14), Workday:

- Allocates 1 hour to *Time Off A* as Thursday becomes the 3rd occurrence. The original allocation value changes from 4 to 5.
- Deducts 1 hour from *Time Off C*.

Related Information
Tasks

Steps: Create a Time Off on page 2104

Create Time Off Plans That Track Balances on page 2126
Steps: Create Calendars
Steps: Set Up Absence Occurrences on page 2413

Reference

Reference: Edit Tenant Setup - HCM

Example: Count Absence Occurrences Starting in the Prior 12 Months

This example illustrates how to create a calculation for a quantity-per-occurrence value on an absence table tier. The calculation counts the absence occurrences that start within the 12 months before the start date of the current occurrence. Workday counts occurrences up to, but excluding, the current occurrence. Workday only counts occurrence types that match the absence table in context.

Context

Global Modern Services applies different waiting periods to paid sick time off plans depending on the country. Their *UK Sick Time Off* absence table configuration includes a waiting period tier called *Waiting Period Plan 4*. Workday uses the **Quantity per Occurrence** value to allocate time off units to the waiting period tier for each request. The quantity depends on the number of absence occurrences. Each tier in the absence table includes an hours-based plan. You create the time offs, time off plans, and *UK Sick Time Off* absence table:

Priority	Absence Tier Plan	Time Off Plan Balance	Time Off Plan Balance Lower Limit	Time Off Name	Maximum Unpaid Time Off Units Allowed	Days to Include	Accrual per Period
1	*Waiting Period Plan 4*	*0*	*0*	*Time Off D*	*None*	*Workdays (Non-Holiday)*	*0*
2	*Time Off Plan 5*	*4*	*0*	*Time Off E*	*0*	*Workdays (Non-Holiday)*	*4*
3	*Time Off Plan 6*	*4*	*0*	*Time Off F*	*None*	*Workdays (Non-Holiday)*	*0*

You're preparing to configure the **Quantity per Occurrence** value. You want to create a conditional calculation that allocates time off units, based on the results of value comparison calculations. If the count is:

- *1*, the quantity is *1*.
- *2*, the quantity is *3*.
- Greater than or equal to *3*, the quantity is *4*.

Otherwise, the quantity is zero. Each of these calculations uses the **Count of Absence Occurrences Starting in Prior 12 Months** instance value calculation (IVC).

Prerequisites

Create the absence table, leaving the **Quantity per Occurrence** fields empty.

Create and assign calendars.

Set up absence occurrences.

Security:

- *Set Up: Payroll (Calculations - Generic)* domain in the Core Payroll functional area.
- These domains in the Time Off and Leave functional area:
    - *Set Up: Time Off (Calculations - Absence Specific)*
    - *Set Up: Time Off (Calculations - Generic)*
    - *Worker Data: Time Off (Time Off)*
    - *Worker Data: Time Off (Time Off Manager View)*

Steps

1. Create the value comparison calculations.

a) Access the **Create Value Comparison Calculation** task and enter:

Field	Value
Name	*If count = 1 starting in prior 12 months*
Category	*Absence*
Comment	*True if the count of absence occurrences for the absence type starting in the prior 12 months is equal to 1.*
1st Operand	*Count of Absence Occurrences Starting in Prior 12 Months*
Operator	*equal to*
2nd Operand	*1*

b) Click **OK** and **Done**.

c) Access the **Create Value Comparison Calculation** task and enter:

Field	Value
Name	*If count = 2 starting in prior 12 months*
Category	*Absence*
Comment	*True if the count of absence occurrences for the absence type starting in the prior 12 months is equal to 2.*
1st Operand	*Count of Absence Occurrences Starting in Prior 12 Months*
Operator	*equal to*
2nd Operand	*2*

d) Click **OK** and **Done**.

e) Access the **Create Value Comparison Calculation** task and enter:

Field	Value
Name	*If count >=3 starting in prior 12 months*
Category	*Absence*
Comment	*True if the count of absence occurrences for the absence type starting in the prior 12 months is greater than or equal to 3.*

Field	Value
1st Operand	*Count of Absence Occurrences Starting in Prior 12 Months*
Operator	*greater than or equal to*
2nd Operand	*3*

f) Click **OK** and **Done**.

2. Create a conditional calculation for the **Quantity per Occurrence** value for a time off type starting in the prior 12 months.

a) Access the **Create Conditional Calculation** task and enter:

Field	Value
Name	*Quantity Based on Count Starting in Prior 12 Months*
Category	*Absence*
Comment	*If count = 1 then 1* *If count = 2 then 3* *If count >= 3 then 4* *Else 0*
Default Response	*0*

b) Add these rows to the **Calculation**:

Order	Condition	Result
a	*If count = 1 starting in prior 12 months*	*1*
b	*If count = 2 starting in prior 12 months*	*3*
c	*If count >=3 starting in prior 12 months*	*4*

c) Click **OK** and **Done**.

3. Add the calculation to the absence table tier.

a) Access the **Edit Absence Table** task and select the *UK Sick Time Off* absence table.

b) In the **Quantity per Occurrence** column for the *Waiting Period Plan 4* absence tier plan, select *Quantity Based on Count Starting in Prior 12 Months*.

c) Click **OK** and **Done**.

Result

You can access the:

- **View Absence Occurrences Summary** report to find out how many occurrences workers have that start within 12 months before a worker's time off request.
- **Absence Tier Time Off Entry Details** report to review how Workday splits the units by absence table tier, based on the quantity-per-occurrence calculation.

Tier Allocation

Seth makes a single time off request for 2 separate dates using the *UK Sick Time Off* absence table for 5 hours each on:

- Friday (2021-01-29)
- Monday (2022-02-14

The **Count of Absence Occurrences Starting in Prior 12 Months** IVC returns *0* because:

- The dates are over a year apart.
- Seth doesn't have any other absence occurrences during this time.
- Workday doesn't include the current occurrence.

Workday allocates:

- 4 hours to the second tier (*Time Off E*) and 1 hour to the third tier (*Time Off F*) for 2021-01-29.
- 5 hours to *Time Off E* for 2022-02-14.

Seth makes another 2 requests for time off for 5 hours each on:

- Friday (2021-02-19)
- Monday (2022-01-31)

Alison, Seth's manager, accesses the:

- **View Absence Occurrences Summary** report to see that Seth now has absence occurrences starting in the prior 12 months.
- **Absence Tier Time Off Entry Details** report to see that for Seth's time off request on 2021-02-19, the waiting period applies because the **Count of Absence Occurrences Starting in Prior 12 Months** IVC returns *1*, excluding the current occurrence. Workday allocates:
  - 1 hour to the waiting period tier (*Time Off D*), overriding the zero balance.
  - 4 hours to *Time Off E*.

The waiting period also applies for the time off request on 2022-01-31. Workday allocates:

- 1 hour to *Time Off D*.
- 3 hours to *Time Off E*.
- 1 hour to *Time Off F*, after depleting the balance of *Time Off E*.

Example: Count Absence Occurrences in the Current Balance Period

This example illustrates how to create a calculation for a quantity-per-occurrence value on an absence table tier. The calculation counts the absence occurrences that fall within or span the balance period for the time off plan as of the occurrence start date. The calculation determines the quantity based on that number.

Context

Global Modern Services applies different waiting periods to paid sick time off plans depending on the country. Their *Ireland Sick Time Off* absence table configuration includes a waiting period tier called *Waiting Period Plan 7*. Workday uses the **Quantity per Occurrence** value to allocate time off units to the waiting period tier for each request. The quantity depends on the number of absence occurrences in the current balance period. Each tier in the absence table includes an hours-based plan. You create the time offs, time off plans, and *Ireland Sick Time Off* absence table:

Priority	Absence Tier Plan	Time Off Plan Balance	Time Off Plan Balance Lower Limit	Time Off Name	Maximum Unpaid Time Off Units Allowed	Days to Include	Accrual per Period
1	*Waiting Period Plan 7*	*0*	*0*	*Time Off G*	*None*	*Workdays (Non-Holiday)*	*0*
2	*Time Off Plan 8*	*4*	*0*	*Time Off H*	*0*	*Workdays (Non-Holiday)*	*4*
3	*Time Off Plan 9*	*4*	*0*	*Time Off I*	*None*	*Workdays (Non-Holiday)*	*0*

You're preparing to configure the **Quantity per Occurrence** value. You want to create a conditional calculation that allocates time off units based on the results of value comparison calculations. If the count is:

- *1*, the quantity is *0*.
- *2*, the quantity is *2*.
- Greater than or equal to *3*, the quantity is *3*.

Otherwise, the quantity is zero. Each of these calculations uses the **Count of Absence Occurrences in Current Balance Period** instance value calculation (IVC).

Prerequisites

Create the absence table, leaving the **Quantity per Occurrence** fields empty.

Create and assign calendars.

Set up absence occurrences.

Security:

- *Set Up: Payroll (Calculations - Generic)* domain in the Core Payroll functional area.
- These domains in the Time Off and Leave functional area:
  - *Set Up: Time Off (Calculations - Absence Specific)*
  - *Set Up: Time Off (Calculations - Generic)*
  - *Worker Data: Time Off (Time Off)*
  - *Worker Data: Time Off (Time Off Manager View)*

Steps

1. Create the value comparison calculations.
   a) Access the **Create Value Comparison Calculation** task and enter:

Field	Value
Name	*If count = 1 in current balance period*
Category	*Absence*
Comment	*True if the count of absence occurrences for the time off type in the current balance period is equal to 1.*

Field	Value
1st Operand	*Count of Absence Occurrences in Current Balance Period*
Operator	*equal to*
2nd Operand	*1*

b) Click **OK** and **Done**.

c) Access the **Create Value Comparison Calculation** task and enter:

Field	Value
Name	*If count = 2 in current balance period*
Category	*Absence*
Comment	*True if the count of absence occurrences for the time off type in the current balance period is equal to 2.*
1st Operand	*Count of Absence Occurrences in Current Balance Period*
Operator	*equal to*
2nd Operand	*2*

d) Click **OK** and **Done**.

e) Access the **Create Value Comparison Calculation** task and enter:

Field	Value
Name	*If count >= 3 in current balance period*
Category	*Absence*
Comment	*True if the count of absence occurrences for the time off type in the current balance period is greater than or equal to 3.*
1st Operand	*Count of Absence Occurrences in Current Balance Period*
Operator	*greater than or equal to*
2nd Operand	*3*

f) Click **OK** and **Done**.

2. Create a conditional calculation for the **Quantity per Occurrence** value for a time off type in the current balance period.

a) Access the **Create Conditional Calculation** task and enter:

Field	Value
Name	*Quantity Based on Count in Current Balance Period*
Category	*Absence*
Comment	*If count = 1 then 0* *If count = 2 then 2*

Field	Value
	If count >= 3 then 3 *Else 0*
Default Response	*0*

b) Add these rows to the **Calculation**:

Order	Condition	Result
a	*If count = 1 in current balance period*	*0*
b	*If count = 2 in current balance period*	*2*
c	*If count >= 3 in current balance period*	*3*

c) Click **OK** and **Done**.

3. Add the calculation to the absence table tier.

a) Access the **Edit Absence Table** task and select the *Ireland Sick Time Off* absence table.

b) In the **Quantity per Occurrence** column for the *Waiting Period Plan 7* absence tier plan, select *Quantity Based on Count in Current Balance Period*.

c) Click **OK** and **Done**.

Result

You can access the:

- **View Absence Occurrences Summary** report to find out how many occurrences workers have that start or end within the period, span the period, or start and end within the period.
- **Absence Tier Time Off Entry Details** report to review how Workday splits units by absence table tier when workers request time off.

Tier Allocation

Jamie requests 5 hours time off on Tuesday (2021-02-11) using the *Ireland Sick Time Off* absence table. Alex, Jamie's manager, accesses the:

- **View Absence Occurrences Summary** report. Alex can see that Jamie has 1 absence occurrence for Wednesday (2021-01-13), starting in the current balance period. Jamie has another 3-day occurrence from Wednesday (2020-12-30) to Monday (2021-01-04), starting before and continuing into the period. Because the time off occurs at either side of a weekend and bank holiday, Workday joins the days into a single occurrence.
- **Absence Tier Time Off Entry Details** report. Because the **Count of Absence Occurrences in Current Balance** returns *3*, Alex can see that for Jamie's time off request on 2021-02-11, a waiting period applies.

Workday allocates:

- 3 hours to the first tier (*Time Off G*).
- 2 hours to the second tier (*Time Off H*).

Example: Allocate an Amount of Time Off Units for Each New Absence Occurrence

This example illustrates how to specify a quantity-per-occurrence value on an absence table tier to allocate the same amount of time off units for each new absence occurrence.

Context

Global Modern Services applies different waiting periods to paid sick time off plans depending on the country. Their *Spain Sick Time Off* absence table configuration includes a waiting period tier called *Waiting Period Plan 10*. Workday uses a static **Quantity per Occurrence** value to allocate time off units to the waiting period tier for the absence occurrences associated with the request. Each tier in the absence table includes a days-based plan. You create the time offs, time off plans, and *Spain Sick Time Off* absence table:

Priority	Absence Tier Plan	Time Off Plan Balance	Time Off Plan Balance Lower Limit	Time Off Name	Maximum Unpaid Time Off Units Allowed	Days to Include	Accrual per Period
1	*Waiting Period Plan 10*	*0*	*0*	*Time Off J*	*None*	*Workdays (Non-Holiday)*	*0*
2	*Time Off Plan 11*	*4*	*0*	*Time Off K*	*0*	*Workdays (Non-Holiday)*	*4*
3	*Time Off Plan 12*	*4*	*0*	*Time Off L*	*None*	*Workdays (Non-Holiday)*	*0*

Prerequisites

Create the absence table, leaving the **Quantity per Occurrence** fields empty.

Set up absence occurrences.

Security:

- *Set Up: Payroll (Calculations - Generic)* domain in the Core Payroll functional area.
- These domains in the Time Off and Leave functional area:
  - *Set Up: Time Off (Calculations - Absence Specific)*
  - *Set Up: Time Off (Calculations - Generic)*
  - *Worker Data: Time Off (Time Off)*
  - *Worker Data: Time Off (Time Off Manager View)*

Steps

1. Access the **Edit Absence Table** task and select the *Spain Sick Time Off* absence table.
2. In the **Quantity per Occurrence** column for the *Waiting Period Plan 10* absence tier plan, enter *3*.
3. Click **OK** and **Done**.

Result

You can access the **Absence Tier Time Off Entry Details** report to review how Workday splits the units by absence table tier, based on the **Quantity per Occurrence** static value.

Tier Allocation

Sarah requests time off for these 10 days in a single time off request:

- Wednesday - Friday (2022-09-07 to 2022-09-09).
- Monday-Friday (2022-09-12 to 2022-09-16)
- Monday-Tuesday (2022-09-19 to 2022-09-20)

Workday treats the groups of days as 1 occurrence because the **Days to Include** value is *Workdays (Non-Holiday)* and Sarah doesn't select weekends.

Workday allocates:

- 3 days to the first tier (*Time Off J*).
- 7 days to the second tier (*Time Off K*).

Maintain Related Absence Occurrences

Prerequisites

- Enable Quantity per Occurrence on absence table tiers. See Reference: Edit Tenant Setup - HCM.
- Create or edit absence tables for each absence table type that workers can select when requesting time off. Select a numeric constant value calculation for the **Quantity per Occurrence** value on an absence table tier to configure a waiting period that allocates a quantity of time off units per absence occurrence. Don't add a *Maximum Unpaid Time Off Units Allowed* validation on any tier. Workday doesn't support this validation for related absence occurrences.
- Enable absence tables for occurrences. See Configure Absence Occurrences.
- Security: *Worker Data: Related Absence Occurrences* domain in the Time Off and Leave functional area.

Context

In several European countries, statutory sick leave gives workers an entitlement for each occurrence of sickness. However, if a doctor determines that new periods of sickness are related to previous ones, all related sicknesses share the same entitlement.

When workers are sick and entitled to receive sick payments for time off, organizations sometimes apply an unpaid waiting period at the start of the sickness that only applies for that specific occurrence. If a worker's sickness is related to a previous sickness, Workday applies the same waiting period to the second occurrence, as Workday treats it as a continuation of the first one. The worker only starts receiving sick payments when an occurrence or related occurrence exhausts the waiting period quantity. Example: You have a 3-day unpaid waiting period and you enter 5 days time off for sickness from August 7 to August 11. The remaining 2 days are paid. If you have a subsequent occurrence from the August 21 to August 25, the first 3 days are unpaid and the next 2 days are paid if the occurrences are unrelated.

You can relate absence occurrences by linking them within a group. This changes the tier allocation behavior because the waiting period applies to the combined occurrences. Workday calculates the tier splitting automatically based on the links in the group.

Steps

1. Access the **Maintain Related Absence Occurrences** task.
2. As you complete the task, consider:

Option	Description
Workers	Select workers that have absence occurrences that you want to relate.
Start Date	Select a start date to filter groups based on a specific start date.
End Date	Select an end date to filter groups based on a specific end date.

3. Click **OK**.

   Note: If the workers that you select don't already have groups created, Workday displays an empty grid. Otherwise, Workday enables you to edit the groups and create new ones.

4. To relate absence occurrences for a worker, link them within a group:
   a) Add a row and select a worker.
   b) In the **Links in Group** columns, add a row for each related absence occurrence and select an occurrence from the **Absence Occurrence for Worker** prompt. Workday displays the date range of the occurrence and the name of the absence table related to the time off.
   c) Select link start and end dates to group entire or partial date ranges from an absence occurrence.
5. Click **OK**.

   Note: Workday filters groups based on the criteria in the initial pop-up window. If you add new groups for other workers or different start and end dates, Workday saves the groups but hides them when you click **OK**. You can view the new groups when you access the task again and select matching criteria.

Result

Workday runs an absence table reevaluation job automatically and reapplies the **Quantity per Occurrence** value across the related absence occurrences, treating them as a single occurrence in terms of tier splitting.

Access the **Absence Tier Time Off Entry Details** report to view how Workday allocates time off units to absence table tiers for each time off entry in the related absence occurrences. The **Automatic Time Off Correction Event** column indicates corrections to the tier allocation when the links that you add in the **Maintain Related Absence Occurrences** task impact tier allocation and units cascade to the next tier.

Linking doesn't change the number of absence occurrences for reporting purposes, but Workday treats them as one in terms of tier splitting and allocating time off units. These reports continue to display the related absence occurrences separately:

- **View Absence Occurrences Detail**
- **View Absence Occurrences Summary**

Example Steps: Group Related Absence Occurrences

Context

This example illustrates how to group multiple absence occurrences so that Workday treats them as a single occurrence in terms of quantity-per-occurrence tier allocation.

In Global Modern Services (GMS), when workers request time off due to illness, the company applies an unpaid waiting period of 3 days to each period of illness. However, when a new period of illness is related to a previous one, the waiting period applies to both.

Steps

1. Create an absence table to enable workers to enter time off due to illness and apply a waiting period.

   See Example: Create an Absence Table That Applies a Waiting Period.
2. Enable the absence table for absence occurrences so that Workday can calculate absence occurrences for the absence type.

   See Example: Enable an Absence Table for Absence Occurrences.

3. As a manager, sign into Workday and enter time off for your test user. Example: Sign in to Workday as Steve Morgan and enter time off for Logan McNeil.

   In 2020, Logan has these time off entries against an absence table for short-term sickness called *GMS Sick Days*:

   - May 21 to May 27
   - July 3 to July 5
   - September 3 to September 11
   - October 29
   - November 30 to December 4
   - December 16 to December 24
4. Access the **View Absence Occurrences Detail** report.

   Note that there are 6 separate absence occurrences, 1 for each period of absence, which is either a set of continuous days or a single day.
5. Access the **Absence Tier Time Off Entry Details for Worker** report.

   Note that for each new occurrence, Workday resets the entitlement and allocates the quantity-per-occurrence value of 3 units to the first tier, which is the waiting period tier, and then cascades to the next tier for the additional units.
6. Link several of the absence occurrences for Logan who has a reoccurring illness.

   See Example: Link Related Absence Occurrences Together report.
7. Access the **Absence Tier Time Off Entry Details for Worker** report.

   Note that this time Workday combines the related absence occurrences and applies the quantity-per-occurrence value to each combined occurrence.

Example: Create an Absence Table That Applies a Waiting Period

This example illustrates how to create an absence table to enable workers to enter time off due to illness and apply a waiting period.

Context

You'll create an absence table that:

- Combines 2 day-based time off plans under 1 absence type.
- Applies a waiting period by including a quantity-per-occurrence value that allocates time off units to the first tier for each absence occurrence.

Prerequisites

- Enable quantity per occurrence on absence table tiers in your tenant.
- Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area.

Steps

1. Access the **Create Absence Table** task.

   Create the *GMS Sick Days* absence table to enable GMS workers or their managers to enter time off when they're sick.

   a) For **Name**, enter *GMS Sick Days*.

   b) On the **Absence Table Tiers** tab, add a row with a **Priority** of *1*.

2. From the **Absence Tier Plan** prompt, select **Create Time Off Plan**.
   a) Enter or select these values:

Field	Value
Name	*GMS Sick Days Tier 1 Waiting Period Plan*
Track Balance	Select the check box.
Balance Period	*YTD - Current Calendar Year (based on Period Start*
Period Schedule	*Monthly*
Unit of Time	*Days*
Balance Visibility	*Eligible in period (based on As of Date)*
Calendar Display	*Plan and Type*
Carryover Date	*First Period of Balance Period Start Date*
Limit	Zero
Accrual Frequency Method for Time Off Plan	*Start of Period*
Days to Include	*All Days*
Effective Date	*01/01/2020*

3. On the **Accrual** tab, add a row.
   a) From the **Adds to Balance** prompt, select **Create Accrual**.
   b) Enter or select these values and click **OK**:

Field	Value
Name	*GMS Sick Days Tier 1 Accrual*
Code	*gms-sick-days-tier1-accrual*
Calculation	Zero
Priority	*1*
Adjustments/Overrides Allowed	Select the check box.
Options	*None*

4. On the **Time Off** tab, add a row.
   a) From the **Subtracts from Balance** prompt, select **Create Time Off**.
   b) Enter these values:

Field	Value
Name	*GMS Sick Days Tier 1 Time Off*
Code	*gms-sick-days-tier1-timeoff*

   c) From the **Time Off Type** prompt, select **Create Time Off Type**.
   d) Enter these values and click **OK**:

Field	Value
Name	*GMS Sick Days Time Off*

Field	Value
Time Off Type ID	*gms-sick-days-timeoff*

e) Enter or select these values:

Field	Value
Priority	1
Adjustments Allowed	Select the check box.
Entry Option	*Enter through Time Off Only*

f) Click **OK**. Workday adds the new *GMS Sick Days Tier 1 Waiting Period Plan* and *GMS Sick Days Tier 1 Time Off* components to the **Absence Tier Plan** and **Time Off** prompts, respectively.

5. From the **Quantity per Occurrence** prompt, select **By Category, Type** > **Common** > **Constant Value Calculation** *3*.
6. On the **Absence Table Tiers** tab, add a second row with a **Priority** of *2*.
7. Repeat steps 2 through 4 for the next tier. This time, name the new time off plan, accrual, and time off components *GMS Sick Days Tier 2 Plan*, *GMS Sick Days Tier 2 Accrual*, and *GMS Sick Days Tier 2 Time Off*, respectively.
8. From the **Time Off Type** prompt, select the same *GMS Sick Days Time Off* type that you created earlier.
9. Click **OK**. Workday adds the new *GMS Sick Days Tier 2 Plan* and *GMS Sick Days Tier 2 Time Off* components to the **Absence Tier Plan** and **Time Off** prompts, respectively.
10. Click **OK** and **Done**.

Example: Enable an Absence Table for Absence Occurrences

This example illustrates how to enable an absence table for absence occurrences so that Workday can calculate absence occurrences for the absence type.

Context

You'll enable absence occurrences for an absence table that applies a waiting period when workers request time off against an absence type for sickness.

Prerequisites

- Example: Create an Absence Table That Applies a Waiting Period
- Security: These domains in the Time Off and Leave functional area:
  - *Set Up: Leave of Absence*
  - *Set Up: Time Off*

Steps

1. Access the **Configure Absence Occurrences** task.
2. In the **Absence Tables** grid, select the **Enable for Absence Occurrences** check box in the row that corresponds to the *GMS Sick Days* absence table.
3. Click **OK**.

Result

Next Steps

Example: Link Related Absence Occurrences Together

This example illustrates how to group multiple absence occurrences so that Workday treats them as a single occurrence in terms of quantity-per-occurrence tier allocation.

Context

You're an Absence administrator for GMS and you want to link 4 of the absence occurrences for Logan who has a reoccurring illness:

- May 21 to May 27
- September 3 to September 11
- October 29
- December 16 to December 24

Steps

1. Access the **Maintain Related Absence Occurrences** task and add a row.
2. From the **Worker** prompt, select *Logan McNeil*.
3. In the **Links in Group** section, add 4 rows.
4. Select these date values from the **Absence Occurrence for Worker** prompt:
    - *2020-05-21 - 2020-05-27. GMS Sick Days*
    - *2020-09-03 - 2020-09-11. GMS Sick Days*
    - *2020-10-29 - 2020-10-29. GMS Sick Days*
    - *2020-12-16 - 2020-12-24. GMS Sick Days*
5. Click **OK** and **Done**.

Accrual Adjustments and Overrides

Setup Considerations: Accrual Adjustments and Overrides

You can use this topic to make configuration decisions for accrual adjustments and overrides. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Accrual adjustments and overrides track, calculate, and adjust a worker's time off balance without the need for manual intervention.

Business Benefits

Accrual adjustments and overrides:

- Build onto existing accrual functionality as needed.
- Lower operational costs allocated to accrual adjustments.

Use Cases

- Use adjustments and overrides when workers change or lose their accrual eligibility due to a change in employment status or change in collective agreement assignment.

- Adjust a specific worker's accrual amount as part of their contract negotiations. This adjustment can require an override of the worker-based time off plan.
- Automatically adjust a front-loaded accrual for floating holidays when a worker converts from part time to full time.
- Transfer or pay out time off balances when workers become eligible for a different time off plan. Example: Workers move from a role with an hourly time off plan to 1 with a daily plan. Their existing balances, and future time off requests, transfer to the new time off plan. The units change from hours to days.
- You can reward workers with additional time off for a length of time. Workers can also negotiate additional accrual to front load at the beginning of a period.

Questions to Consider

Question	**Considerations**
Do your part-time and full-time employees accrue at different rates?	You might need to do an accrual adjustment when employees change from 1 type to the other, or when employees' collective agreement assignment changes.
When do you schedule your accruals?	If your workers accrue time off at the end of each month, configure your lower limit calculation to enable workers to use their accrual before they accrue it. Workers can book time off even if they haven't accrued the requisite number of units.
Are you adding the adjustment retroactively?	If yes, retroactive adjustments can impact a worker's time off balance. Example: You increase a worker's accrual in April and the adjustment can apply for the remainder of the calendar year.
Do you want to adjust workers' accruals when they become eligible for a new time off plan in the middle of a balance period?	On the time off plan, you can configure an accrual with options such as: • Adjustments or overrides allowed. • *Front-loaded* or *Based on As of Date* If you add the *Automated Accrual Adjustment* service step to the *Change Job*, *Assign Collective Agreement*, or *End Collective Agreement* business process, Workday adjusts the accrual for workers during the period if their accrual value changes. Changes are a result of a change job event when: • Workers gain or lose eligibility to the accrual itself. • Condition rules resolve differently. Example: A worker's time type or location changes. When accrual calculations evaluate differently for workers in the middle of a balance period, after a change job event, the service creates an automated accrual adjustment that reflects the transfer date.

Recommendations

- Configure accrue-as-you-go plans where time offs connect to Payroll Earnings and don't have a definable accrual calculation. Example: Workers generally accrue bereavement leave in an amount that matches their leave request rather than in weekly or monthly increments.

- Set **Accrual - Adjustments / Overrides Allowed** for plans that accrue.
- Don't set **Accrual - Adjustments / Overrides Allowed** for accrue-as-you-go plans.
- Check for impacts on future-dated time off requests.
- Rerun the **Schedule Time Off Calculated Balance Process** task when you add the adjustment retroactively. Example: Evaluate if a previously unpaid time off request requires payment.
- When overriding a worker's accrual and balance, ensure that you configure your balance override to include the accrual amount. Example: You want to override a worker's balance at the start of a period to zero. They also accrue 5 hours at the start of that period. Set the balance override to -5 hours, or use the **Maintain Accrual and Time Off Adjustments Overrides** task to set the accrual to zero.
- When you use the **Maintain Accrual and Time Off Adjustments Overrides** task to set an accrual override, specify an end date, where possible.
- When creating accruals, consider mid-year hires. Example: You can create different accruals for workers with hire dates on or before the balance-period start date, and new workers with hire dates during the year. This is important when you don't want new hires to receive automated accrual adjustments. Create:
    - A *Front-loaded* accrual with a calculation that doesn't include proration for the periods before new worker hire dates, but allows adjustments and overrides, and responds to the *Automated Accrual Adjustments* service. Example: Full year entitlement for the time off plan is 30 days. You use eligibility overrides to ensure that only workers with hire dates on or before the balance-period start date are eligible.
    - An accrual with a calculation that prorates the time off plan balance from the new hire’s hire date to the end of the balance period. This ensures workers hired after the balance-period start date receive a reduced entitlement for the balance period. Select an **Options** value of *None* to prevent the *Automated Accrual Adjustment* service impacting the accrual for new hires. Use eligibility overrides to ensure that only workers with hire dates after the balance-period start date are eligible for the accrual. Example: New hires that join the organization half-way through the year receive half of the full year entitlement of 30 days, resulting in an accrued value of 15 days.
- When creating accruals for mid-year hires that should receive automated accrual adjustments for *Change Job*, *Assign Collective Agreement*, or *End Collective Agreement*, events within their first year, ensure that any conditions in the accrual calculation identify workers as mid-year hires and not just within the period they were hired. Example: Instead of using the delivered *Scheduling: Worker Hired Mid-Period* calculation, use a logic calculation such as *Worker: Current Calendar Year Hire Date (Not Terminated in Current Period)* for calendar-year balance periods and adjust as necessary for alternative balance periods. Taking this approach helps to avoid unexpected results in the automated adjustments for mid-year hires.

Requirements

Front-loaded accruals must use 1 of these schedules:

- Front-loaded or annual - first period of year (based on period end date). Automatic proration can insert accruals.
- Mid-period hire or termination.
- Annual period schedule.

Limitations

- You can't use front-loaded accruals or Based On as of Date accruals with position-based time off plans.
- Automatic accrual adjustments for front-loaded accruals can apply to workers with hire dates that occur after the start date of a period, but might lead to unexpected results. Example: The start of the period that the front-loaded accrual uses is January 1, worker’s hire date is February 12. Automatic accrual adjustments apply if a worker changes jobs, using the *Change Job* business process, during the period. Example: If the worker changes jobs in August the accrual adjusts automatically based on their hire date in February.

- The *Automated Accrual Adjustment* service on the *Change Job*, *Assign Collective Agreement*, and *End Collective Agreement* business process creates adjustments for both position-based and worker-based time off plans. However, Workday doesn't display position references on the **Automated Adjustments** tab of the **Maintain Accrual and Time Off Adjustments/Overrides** task. Although the service creates automated accrual adjustments for positions, but not always for non-primary positions, Workday doesn't reflect the adjustments on the worker's balance.
- You can't edit or delete time off plan accrual adjustments and overrides for terminated workers. When you don't specify an end date for an accrual override, if you rehire the workers, their overrides remain. This can cause incorrect absence balance and payroll calculations, resulting in the need to rescind the hire and termination, if your business process allows.
- Automated accrual adjustments don't create adjustments that exceed the upper or lower limits for the time off plan.

Tenant Setup

No impact.

Security

Users with security enabled for the *Worker Data: Time Off (Adjustments and Overrides)* domain in the Time Off and Leave functional area can set up adjustments and overrides.

Business Processes

Workday recommends that you add the *Automated Accrual Adjustment* service step after the *Completion* step on the:

- *Change Job* business process
- *Assign Collective Agreement* business process
- *End Collective Agreement* business process

Reporting

Before you make an accrual adjustment or override, use the **Time Off Balance** report to review the time off plan balance for the relevant worker. This report displays their current annual leave allowance of 20 days. Example: You want to grant a worker 25 days annual leave. You create the adjustment of +5 days.

You can use the **Accrual and Time Off Adjustments/Overrides** report data source to create custom reports.

Integrations

The EIB based on the *Get Absence Inputs* web service enables you to extract multiple time off plan overrides from Workday.

You can use the *Put Absence Input* web service to override time off plan balances.

Connections and Touchpoints

Time off accrual adjustments impact any payroll calculations that reference the time offs. Example: Paid vacation and unpaid sick leave. You can time-limit retroactive time off accrual adjustments for Payroll or Time Tracking.

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships across your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Other Impacts

Adjustments can impact:

- Carryover balance.
- Total accrual if the time off plan includes limits.

Related Information

Reference

The Next Level: PATT Touchpoints with Assignments

The Next Level: Absence Accruals

2023R1 What's New Post: Rounding on Automated Accrual Adjustments

Manually Adjust or Override a Worker's Accrual

Prerequisites

- Review setup considerations for accrual adjustments and overrides.
- Enable the **Adjustments/Overrides Allowed** option.
- Security: *Worker Data: Time Off (Adjustments and Overrides)* domain in Time Off and Leave functional area.

Context

An accrual adjustment adds to or subtracts from the accrual units of a worker for a single processing period. By contrast, an override replaces the standard accrual calculation with the override units and can span more than 1 processing period. Before adjusting an accrual, review the worker's current time off plan balance on the **Time Off Balance** report.

- If the worker isn’t eligible for the accrual, Workday processes the adjustment only if you modify the accrual eligibility criteria. This rule doesn't apply to front-loaded or based-on-as-of-date accruals. You can only create adjustments for those accruals for which the worker is eligible.
- Workday applies override instructions before adjustments.

  Example: The standard accrual is 12 hours and you enter an override of 15 and an adjustment of 2. The employee accrues 17 hours.
- Accrual limits and the timing of accrual processing can reduce or eliminate an adjustment.
- If the accrual occurs more than once during the period, Workday applies the adjustment to each accrual.

This topic describes how you can manually adjust accruals in Workday. You can also use the *Put Absence Input* web service to adjust accruals.

Steps

1. Access the **Maintain Accrual and Time Off Adjustments/Overrides** task.
2. Select the **Worker**.
3. On the **Adjustments** tab, add a row for each adjustment.

   As you complete the task, consider:

Option	Description
Select Accrual/Time Off	Select the accrual or time off from the **Eligible As Of Today** or **Not Eligible As Of Today** prompts. **Note:** If you select an accrual the worker is ineligible for, modify the accrual eligibility criteria so that Workday can process the adjustment.
Units	Enter the number of units to add to the worker's standard accrual or enter a negative number to subtract from the standard accrual units.

Option	Description
Period	The period to adjust. Workday automatically displays periods associated with the time off plan that includes the accrual. To select a period for which the worker is ineligible for the accrual, select from the **All Periods for Start Period** folder.
Reference Date	Displays the first day of the period. **Note:** If an accrual expires, you can change the reference date to any date in the selected period and your accrual adjustment will be effective as of that date.
Position	Applies only if the accrual is associated with a position-based time off request.
Batch ID	You can link the adjustment to a batch ID created using the *Put Absence Input* web service. Batch IDs enable you to manage accrual adjustments and overrides for multiple workers at the same time. You can view adjustments and overrides in the **Accrual and Time Off Adjustments/Overrides by Batch ID** report. You can also delete previously loaded adjustments and overrides using the **Delete Accrual and Time Off Adjustments/Overrides by Batch ID** task and then reload them.

4. On the **Automated Adjustments** tab, add a row for each front-loaded or based-on-as-of-date accrual adjustment.

   As you complete the task, consider:

Option	Description
Units	Enter the number of units to add to the worker's standard accrual or enter a negative number to subtract from the standard accrual units.
Reference Date	Workday automatically populates the first day of the period.

5. (Optional) If you're adjusting an accrual that the worker or position isn’t eligible for, modify the accrual eligibility.
   a) Access the **Edit Time Off Plan** task or the **Edit Accrual** task, depending on where you defined eligibility for the accrual.
   b) Add 1 or more of these calculations to the eligibility rules:
      - *Absence Input (Ongoing) Exists for the Job for Absence Component*
      - *Absence Input (Period-Specific) Exists for the Job for Absence Component*
      - *Absence Input Exists for the Job for Absence Component*

      These rules work for both worker-based and position-based time off plans.

      Add the calculation on a separate row.

6. (Optional) If you're overriding an accrual for the worker to occur in a period that's not the scheduled period for that accrual, modify the scheduling logic to allow overrides as an exception.
   a) Access the **Edit Accrual** task and select the accrual.
   b) On the **Calculations** tab, add 1 or more rows to the **Scheduling** grid with 1 or more of these calculations:
      - *Absence Input (Period-Specific) Exists for the Job for Absence Component*
      - *Absence Input Exists for the Job for Absence Component*

Example

Adjusting an Accrual for a Worker

The standard vacation accrual calculation is 6 hours each month. As a bonus, you want to give Julie an additional 4 hours of accrual for March. The bonus lets her accrue 10 hours that month. Enter these values:

Select Accrual/Time Off	Units	Period
Vacation Accrual	*4*	*03/01/2011 - 03/31/2011*

Donating Time Off to Another Worker

Peter accrues 10 hours of paid time off (PTO) each month. He wants to donate 16 hours to Martha. To record the transfer of hours, enter an adjustment of 16 units for Peter and 16 units for Martha. For Peter, the time off results for the period then display an accrual of -6 hours for the period.

Adjusting an Accrual for which a Worker is Not Eligible

Workday processes the accrual for floating holidays at the beginning of the year. Because Julie was hired midyear, she didn't receive an accrual, but you want to give her 2 hours of accrual. To give Julie the hours:

1. Access the **Edit Time Off Plan** task.
2. Enter a worker eligibility override that uses the calculation *Absence Input (Period Specific) Exists for the Job for Absence Component*.
3. Access the **Maintain Accrual and Time Off Adjustments/Overrides** task.
4. Enter an accrual adjustment for 2 hours in the current period.

Overriding a Worker's Accrual

The standard accrual calculation for a new hire is 4 hours each month for the first year of employment. Julie has negotiated a higher rate of 6 hours each month for her first year. You want to override Julie's standard accrual for March 1, 2011 (her start date) through February 29, 2012, so that she accrues 6 hours each month for her first year.

Select Accrual	Units	Start Period	End Period
Vacation Accrual	*6*	*03/01/2021 - 03/31/2021*	*02/01/2022 - 02/29/2022*

Next Steps

To view accrual adjustments, access these reports:

- **Accrual and Time Off Adjustments/Overrides**. View for a selected organization.
- **Accrual and Time Off Adjustments/Overrides by Batch ID**.

Create Time Off Plan Overrides for Time Offs

Prerequisites

- Create a time off.
- Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area.

Context

Configure eligibility criteria, limits, and other rules for a time off that override the rules on a time off plan.

Steps

1. Access the **Edit Time Off** task.

   Configure the overrides on the **Time Off Plan Overrides** tab.
2. Specify **Worker Eligibility** eligibility rules to override the time off plan's eligibility rules.
3. In the **Limit Override** section, define a lower time off limit that's different from the lower limit defined for the plan.

   The lower limit controls how much time off to pay when workers exceed their available balance.

Option	Description
Value	Select a constant value or a calculation that returns the minimum number of hours or days allowed in the time off plan balance. Time off units that reduce the balance below the limit are unpaid. Example: -40 hours or 5 days depending on the unit of time the plan uses. **Note:** If there's no paid time off when workers reduce their time off balance to zero, enter zero. To enable workers to receive paid time off when their balance falls below zero, enter a negative value.
Based On	Select the time off plan that includes the time off that you're defining. Workday displays the time off plan's balance period.

4. In the **Daily Quantity Default** field, select a value to display when you enter this time off, if it's different from the time off plan's default.

If you select a conditional calculation, the default quantity is based on the first day requested.

Example: You select a calculation that returns a worker's scheduled hours, or 8 hours for workers without a schedule. Jane enters a request for personal time off for Monday, Tuesday, and Friday. Because she's scheduled to work 4 hours on Monday, the default quantity for each day of the request is 4.

Workday generates an error if the quantity exceeds the maximum validation value or causes a request to fail other validations.

Result

When you add the time off to a time off plan that has different rules, the overrides take precedence.

Limiting Paid Vacation to -16 Hours

On the **Time Off Plan Overrides** tab, specify:

- A lower limit of -16 hours in the **Value** field.
- *Vacation* plan in the **Based On** field.

If Andy uses all his vacation time (balance = zero) and then takes 10 more hours, Workday pays all 10 hours, as they fall within the -16 limit. However, if Andy requests an additional 10 hours, Workday pays only 6 of these hours. Workday tracks the remaining hours as unpaid time.

Related Information
Concepts

Concept: Eligibility for Time Off Plans, Time Off, and Accruals on page 2142

Override Time Off Plan Carryover

Prerequisites

- Configure the time off plan to track balances and enable overrides.
- Security: *Worker Data: Time Off (Time Off Balances)* domain in the Time Off and Leave functional area.

Context

You can override a worker's potential carryover units and expiration for a time off plan carryover balance.

When you override a worker's time off plan potential carryover, Workday doesn't update the worker’s carryover balances.

You can use the *Put Carryover Override* web service to accomplish the same goal for multiple workers.

Steps

1. Access the **Maintain Time Off Plan Carryover Overrides** task.

2. As you complete the task consider:

Option	Description
Carryover Date	The date for which you want to override the potential carryover units and expiration.
Limit Override	A non-negative number that can override the Carryover Limit. Workday automatically populates your Carryover Limit value from the plan you select.

Option	Description
Carryover Expiration Override	A mandatory date for which Carryover expiration can be overwritten. Workday automatically populates this date based on: • The selected plan defined carryover. • **Amount of Time Before Expiration**. • **Unit of Time For Expiration**. • Carryover Date.

Suspend Accrual or Time Off Limits for a Worker

Prerequisites

- The accrual or time off is limited.
- Security: *Worker Data: Time Off (Limit Overrides)* domain in Time Off and Leave functional area.

Context

Suspend an accrual or time off limit for a worker for 1 or more absence processing periods.

Steps

1. Access the **Maintain Accrual and Time Off Limit Overrides** task.
2. As you complete the task, consider:

Option	Description
Start and End	The first and last periods to suspend limits for. Available periods are associated with the time off plan that uses the selected accrual or time off.
Position	This field is active only if the accrual or time off belongs to a position-based time off plan.

Steps: Bulk-Prorate Accruals

Prerequisites

Create accruals with an accrual type of *Based on As of Date* or *Front-Loaded*.

Security: These domains:

- *Business Process Administration* and *Manage: Business Process Definitions* in the System functional area.
- *Set Up: Time Off* in the Time Off and Leave functional area.

Context

You can configure your staffing business processes to bulk-prorate accruals for workers automatically in response to job and collective agreement changes.

Steps

1. Edit Business Processes.

   Add the *Bulk Automated Accrual Adjustment* service step after the *Completion* step on these business processes:

   - *Assign Employee Collective Agreement*
   - *Change Job*
   - *End Collective Agreement Assignment*
2. Access the **Evaluate and Process Events Impacting Absence** task.

   Workday runs a background job immediately that initiates evaluation and processing of accrual proration. From this point onwards, Workday initiates the background job automatically every 15 minutes.

Result

When workers have collective agreement or change job events that impact their accrual entitlements, the *Bulk Automated Accrual Adjustment* service step updates the *Bulk Absence Proration* background job to prorate accruals for impacting events. The step creates automated adjustments in bulk for all eligible workers if the accrual is configured as:

- *Based on As of Date* (for mid-period accruals).
- *Front-Loaded*

Related Information
Reference

2024R2 Feature Release Note: Bulk Prorate Accruals

Examples: Effect of Limits and Accrual Timing on Adjustments and Overrides

Time off limits and accrual limits can reduce or even eliminate adjustments and overrides made to a worker's time off or accrual.

Example 1: Accrual Limits	The Vacation time off plan has an accrual limit of 120 hours. Alex has an accrual balance of 110 hours going into the next balance period. The standard monthly accrual is 12 hours. • If you enter an accrual adjustment of 3 hours, Workday adds only 10 hours to the initial balance of 110. • If you enter an override of 15 hours (instead of the adjustment), Workday still adds only 10 hours to the initial balance of 110.
Example 2: Time Off Limits	The Vacation time off plan has a lower limit of zero hours. Alex has an accrual balance of 5 hours and takes off 4 hours. If you enter a time off adjustment of 4, Workday records only 1 adjusted hour as paid time off, because any time off over 5 hours exceeds the time off lower limit.

Effect of Accrual Timing on Adjustments and Overrides

Example 1: Accrual Adjustments	The Vacation time off plan has an accrual limit of 120 hours. The standard monthly accrual is 10 hours. Alex has an accrual balance of 110 hours

going into the next balance period. You enter an accrual adjustment of 2 hours, and Alex requests 12 hours of time off.

- If accrual processing occurs at the beginning of the period, Workday adds the 2 hours to the 10 normally accrued, increasing the balance to 122. It applies the limit and determines that the 120 limit is exceeded by 2. Workday reduces the accrual by 2.
- If accrual processing occurs at the end of the period, Workday reduces the accrual balance of 110 by the 12 hours of time off, leaving a remaining balance of 98. It adds the adjustment of 2 for a total of 110, and applies limit testing. The limit isn't exceeded so Alex doesn't lose vacation time.

Example 2: Accrual Overrides

The Vacation time off plan has an accrual limit of 120 hours. The standard monthly accrual is 10 hours. Alex has an accrual balance of 110 hours going into the next balance period. You enter an accrual override of 15 hours, and Alex requests 12 hours of time off.

- If accrual processing occurs at the beginning of the period, Workday adds the 15 hours to the 110 already accrued. It applies the limit and determines that the 120 limit is exceeded by 5. Workday reduces the accrual for the period to 10.
- If accrual processing occurs at the end of the period, Workday reduces the accrual balance of 110 by the 12 hours of time off, leaving a remaining balance of 98. It adds the override of 15 for a total of 113, and applies limit testing. The limit isn't exceeded so Alex doesn't lose vacation time.

Example 3: Time Off Adjustments

The time off lower limit for sick time is zero hours. Sue has a balance of 2 hours going into the current period. She accrues 2 additional sick hours for the period, takes 2 hours off during the period, and you enter a time off adjustment of 4.

- If accrual processing occurs at the beginning of the period, Workday records 2 of the adjusted hours as paid time off. The other 2 hours exceed the time off lower limit.
- If accrual processing occurs at the end of the period, Workday doesn't record the adjustment as paid time off because it exceeds the time off lower limit.

FAQ: Bulk Prorate Accruals

Where does Workday display accrual adjustments for the Bulk Automated Accrual Adjustment service step?	When you add the *Bulk Automated Accrual Adjustment* service step on the *Assign Employee Collective Agreement*, *Change Job*, or *End Collective Agreement Assignment* business processes, Workday displays accrual adjustments on the **Automated Adjustments** tab of the **Maintain Accrual and Time Off Adjustments/ Overrides** task.
What's the difference between the Automated Accrual Adjustment service step and the Bulk Automated Accrual Adjustment service step?	When you add the *Automated Accrual Adjustment* service step on the business processes, Workday evaluates adjustments to accruals on time off plans when job change transactions are processed manually or through an EIB. Workday executes the service step separately for each worker with a job change transaction. Unlike the *Automated Accrual Adjustment* service step, Workday doesn't execute the *Bulk Automated Accrual Adjustment* step separately for each worker. Instead, it flags events such as *Change Job* or *Collective Agreement* for later batch processing. Once Workday flags an event for processing, a background job that runs every 15 minutes processes these flagged events in batches. This approach is more efficient than using the *Automated Accrual Adjustment* step. The calculation results for the accrual adjustments are the same but it's more efficient to use the *Bulk Automated Accrual Adjustment* step if you're triggering the step from a mass action or Import web service EIB. If you use separate business process definitions for web service transactions from those initiated through the user interface (UI), we recommend that you add the *Bulk Automated Accrual Adjustment* step to these definitions instead of the *Automated Accrual Adjustment* step.
What do I need to do before adopting the Bulk Automated Accrual Adjustment service step on the Change Job business process?	Remove the *Automated Accrual Adjustment* service step from the *Change Job* business process. If you try to use both of these service steps in the same business process definition, Workday displays an error. You can use the service steps on different business process definitions. Example: If you use specific rule-based business process definitions for EIBs and others for those initiated through the UI, you can replace the *Automated Accrual Adjustment* step with the *Bulk Automated Accrual Adjustment* step within the EIB business process definition and continue to use the *Automated Accrual Adjustment* step in your business process definitions initiated through the UI.

Time Off Plan Balances

Setup Considerations: Absence Balances

You can use this topic to help make decisions when planning your configuration and use of absence balances functionality. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Absence balances are the difference between the time off a worker accrues and uses at a specified time.

Business Benefits

Workday absence balances functionality enables you to:

- Optimize performance for time off transactions and reports.
- View a worker's current balance, project future balances, and configure the accrual rate.
- Accurately estimate a worker's unused time off when reviewing a time off request.
- Automatically recalculate a worker's balance when you view their existing balance.
- Improve efficiency by scheduling when you store your time off plan balances.

Use Cases

You can configure absence balances to track and manage time off units for different scenarios, including:

- Worker transfers from 1 locale to another where there's a difference in annual leave regulations.
- Changes in accrual rates. Example: A length of service award.
- Midterm terminations or hires.
- Using balances in eligibility criteria by creating a calculation that references a time off plan balance. You can then use the calculation in a value comparison calculation.

Questions to Consider

Questions	Considerations
What balances do you want to track?	Workday enables you to plan resources and budget correctly by tracking: • Accrued time off. • Time off taken. • Accruals minus time off. • Number of hours or days employees have carried over from one time period to the next.
When do you want to calculate absence balances?	Workday stores balances on the third Sunday of every month at 01:00:00 in your local time zone. You can store balance values and accrual amounts by manually scheduling processes for time off plans and business requirements.

Questions	Considerations
How do you want to manage balances for terminated workers?	You can configure the *Termination* business process that enables you to either forfeit or pay out balances.
When do you want to prorate absence balances?	You can prorate balances that workers receive if their accrual value changes as a result of a change job event. The change could be due to a worker gaining or losing eligibility to the accrual itself within a period, or calculations within the accrual resolving differently. You can prorate the accrual: • Up front. • At the start or end of a period.
Who do you want to be able to view absence balances?	You can hide certain balance types from employees. Example: Sick leave. Managers or administrators can view these balances on reports.

Recommendations

Workday recommends:

- Optimizing performance by scheduling processes to store absence balances regularly. When you store balances regularly, Workday uses the stored balances and accrual amounts as the starting point for subsequent dynamic calculations instead of starting over from a worker's initial processing period. Workday dynamically calculates the balances and accrual amounts on reports based on the rules that you set on the time off plan.
- Tracking balances on time off plans that have a definable accrual. When you have a time off plan with an unlimited or always unpaid balance, create an accrual that uses zero as the calculation.

To avoid confusion, Workday recommends that you hide balances on:

- Accrue-as-you-go time off plans, when the balance is zero.
- Time off plans that don’t have accruals.

Requirements

Don't edit past period schedules because it causes errors in your balance calculations.

Limitations

- Workday doesn’t support transferring negative time off balances.
- You can only transfer balances for worker-based time off plans.
- For performance reasons, we recommend that you don't complete bulk job changes that include balance transfers.

Tenant Setup

To improve performance when generating payslips and storing absence balances, select these check boxes on the **Edit Tenant Setup - Payroll** task:

- **Following Pay Complete**
- **Only for Workers With Check Payments or Payslip Printing Enabled**

Security

Configure these security domains in the Time Off and Leave functional area:

Domains	Considerations
Set Up: Time Off (Calculations - Absence Specific)	Users can create absence balance calculations.
Worker Data: Time Off (Time Off Balances)	Users can override time off plan balances.
Process: Calculated Balances (Run)	Users can: • Manually schedule storage of time off balances. • Remove existing stored balances. • Recalculate balances for workers.

Business Processes

Business Processes	Considerations
Change Job	To transfer time off balances, add the *Maintain Time Off Plan Transfer Balance* action step.
Change Job	To change future time off requests to another plan when worker eligibility changes, add the *Update Time Off Requests* action step.
Change Job	To prorate balances that workers receive when their eligibility for accruals changes, add the *Automated Accrual Adjustment* service step. This setting enables Workday to review the **Front-Loaded** or **As Of Date** settings on the accrual before making the adjustment.
Termination	To cancel any remaining balance on termination for a one-time time off adjustment, add the *Adjust Time Off Balances* service step.

Reporting

Reports or Dashboards	Considerations
All Absence Balances **View Absence Balance**	View absence balances and where they are in use based on your tenant configuration.
All Calculated Balance Recalculation Changes	View worker calculations to confirm how changes to balances impact on their balances.
Calculated Balances for Organization (by Worker)	View calculated balances and accruals for an organization by worker for the calculated run date. The report displays workers who have a difference between their previous: • Balance and new balance. • Accrual and new accrual. This report doesn't support intersection security groups.
Carryover Balances for Organization (by Carryover Date)	View when carryover expires for workers or organizations to plan for resource allocation or budgetary requirements.

Reports or Dashboards	Considerations
Carryover Balances for Organization (by Worker)	
Time Off Results Detail **Time Off Results Summary**	View balances for specific time off plans to plan your resources correctly.
View Override Balances for Organization	Use this report to view all workers with a time off plan balance override by organization. Unlike the **Maintain Time Off Plan Override Balances** task, however, this report doesn't split the total balance units by associated balance period when workers have overrides for more than 1 period. Workday uses contextual role-based security on the **Unit of Time** field to determine whether to display a row for the worker. Example: When workers with the Absence Partner role run the report, they can see data for other workers in their organization, but not for workers in organizations that also have an assigned Absence Partner role.
View Schedules for Time Off Calculated Balance Process	View time off plan schedules and access tasks to change or cancel them.

Integrations

Web Services	Considerations
Get Carryover Override	View a worker's carryover expiration or limit override for their eligible time off plan.
Get Override Balances	Set time off plan override balances for an employee and their time off plan.
Get Time Off Plan Balances	View dynamic time off plan balances by worker and time off plan.
Put Override Balance	Load absence balance information into Workday from an external source.

Connections and Touchpoints

Features	Considerations
Workday Payroll	You can display absence balances on payslips.
Carryover	You can include absence balances in calculations to define your carryover limit.
Time Off	You can use absence balances to determine whether a time off request is paid or unpaid.

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information

Concepts

Setup Considerations: Accrual Adjustments and Overrides on page 2288

Tasks

Create Absence Balances on page 2316

Reference

The Next Level: The Calculation Engine Behind Absence Management

The Next Level: Store Absence Balances

Steps: Transfer Time Off Balances

Prerequisites

Review setup considerations for absence balances.

You can only transfer balances for time off plans that:

- Allow overrides.
- Aren't position-based.
- Don't have expiring accruals configured.
- Track balances.

Context

Transfer balances from a time off plan to another, pay out time off balances, or both, when a worker loses eligibility for a time off plan.

Example: Kristin relocates from New York to Paris. As a result, she loses eligibility for the *USA Paid Time Off* plan and gains eligibility for the *FRA Paid Vacation* plan. Transfer her current balance of 80 hours to her new time off plan.

Note: You can't transfer negative time off balances.

Steps

1. Add these action steps to the *Change Job* business process:
    - *Maintain Time Off Plan Transfer Balance*
    - *Update Time Off Requests*

    See Edit Business Processes.
2. (Optional) Access the **Maintain Time Off Unit of Time Conversion Calculations** task.

    Configure unit conversions when you transfer balances to a time off plan that uses a different unit of time. Example: Convert 8 hours to 1 day.

    Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in Time Off and Leave functional area.
3. (Optional) Map default time off plans for balance transfers and time offs for balance transfer adjustments.
    a) Access the **Create Time Off Plans** task.
    b) Select a **Balance Transfer Default(s)**.
    c) Select a **Time Off for Balance Transfer Adjustment**.

    See Create Time Off Plans That Track Balances on page 2126.

4. (Optional) Update eligibility to allow workers to gain eligibility for a time off plan, based on the effective date of their balance transfer, and not the period start and end dates of the plan.
   a) Access the **Create Time Off Plans** task.
   b) On the **Eligibility** tab, use the *Time Off Eligibility Impacted Mid Period* logic calculation in an eligibility rule.

      Note: Workday recommends that you use this calculation only for eligibility rules in time off plans and not for calculations in accruals or scheduling rules.

      To prevent errors and resolve the calculation for null values when transferring balances, Workday uses default values of *1/3/0001* and *1/2/0002* for the transfer balance effective date.
5. Transfer a worker's current balance to their newly eligible plans, pay out their balances, or both.

   You can review tasks for the *Maintain Time Off Plan Transfer Balance* action step in **My Tasks** when a worker loses eligibility for a time off plan. If their time off plan has balance transfer defaults, they automatically populate in the **Maintain Time Off Plan Transfer Balances** task and you can change them as necessary.
6. Change the time offs in a worker's time off requests to time offs that are compatible with their newly eligible plans.

   You can review tasks for the *Update Time Off Requests* action step in **My Tasks**. If a worker has time off requests that occur after the effective date of the time off plan eligibility change, the task prompts you to update future time off requests.

Result

When a worker loses eligibility for a time off plan, Workday automatically displays events in **My Tasks** prompting you to:

- Transfer the worker's time off plan balances.
- Update any time off requests.

When the balance transfer successfully completes, you can view the updated balance on any task or report that displays the balance.

Example

This example illustrates how you can use the *Time Off Eligibility Impacted Mid Period* logic calculation in an eligibility rule on these tasks:

- **Create Time Off Plan**
- **Edit Time Off Plan**

Workers at Global Modern Services in San Francisco or Boston are eligible for either of these time off plans, based on their job location, or whether they become eligible midperiod due to a job change:

- *Semi-Monthly (Worker-Based Time Off Plan CA)*
- *Semi-Monthly (Worker-Based Time Off Plan MA)*

You set the **Country / Country Region** values on the **Eligibility** tab of the time off plans to *California* and *Massachusetts*, respectively. On the *Semi-Monthly (Worker-Based Time Off Plan MA)* time off plan, you add a logic calculation to the **Worker Eligibility** grid with:

Operator	Calculation
OR	*Time Off Eligibility Impacted Mid Period*

Alex Jones changes job location from San Francisco to Boston on 2015-12-29. You can enter a time off request against *Monthly (Worker-Based Time Off Plan MA)* for Alex for 2015-12-25 and 2016-01-02 because they changed job midperiod, but not for 2015-12-10.

Next Steps

Optionally, you can use the **Maintain Time Off Override Balances** task to view or edit the worker's balance in previous and new time off plans. You can also use the **Maintain Accrual and Time Off Adjustments/Overrides** task to view or edit payout adjustments, if any. Any edits you make on these tasks override the edits on the **Maintain Time Off Plan Transfer Balances** task.

Related Information
Examples

Example: Transfer Time Off Balances on page 2322

Steps: Prorate Front-Loaded Balances

Context

Prorate balances that workers receive up front when their eligibility for accruals changes.

Steps

1. Add the *Automated Accrual Adjustment* service step to the *Change Job* business process.

   The service step automatically prorates any front-loaded balances that the worker has, based on the effective date of the job change. The step triggers when Workday detects a change in what the worker is eligible for based on a conditional calculation within an accrual. Example: A worker previously met the criteria for condition *A*, but then meets the criteria for condition *B*.

   See Set Up Rule Based Consolidated Templates for Job Changes on page 767 and Edit Business Processes.
2. Create a front-loaded accrual that includes a conditional calculation with 1 or more conditions.

   See Create Front-Loaded Accruals on page 2170.
3. Schedule time off plans to accrue at the beginning of the year and add the front-loaded accruals to them.

   See Create Time Off Plans That Track Balances on page 2126.

   a) Access the **Create Time Off Plan** task.
   b) Select a **Balance Period** that is based on a year.
   c) In the **Period Schedule** field, select *Annual*.

      You can select a different period schedule if the front-loaded accrual uses either of these scheduling rules:

      - *Scheduling: Front-Loaded*
      - *Scheduling: Annual - 1st Period of Year (based on Period End Date) or Mid-Period Hire or Termination*
   d) In the **Accrual Frequency Method** field, select *Start of Period*.
   e) On the **Accruals** tab, add the front-loaded accruals.

Result

When workers have job changes that affect their eligibility for front-loaded accruals, Workday detects changes in calculation conditions and creates adjustments to prorate their balance for the period.

Example

At Global Modern Services, full-time workers receive 20 days of time off at the beginning of every year while part-time workers receive 10 days. All workers use a semimonthly period schedule. On August 10, Oscar moves from a full-time position to a part-time position and still has the 20 days he received at the beginning of the year. To reflect the amount of time he spent in each position, Workday prorates his balance to 16.083333 days.

Calculation Details

Adjustment	Calculation
Full periods	As of August 10, 9 full periods remain in the year so the adjustment for the full periods is: (-10 days/24 periods) * (9 periods) = -3.75 days.
Partial period	August 10 is in the middle of the August 1 - August 15 period. As of August 10, 6 days remain in the period so the adjustment for the partial period is: (-10 days/24 periods) * (6 days left in period/15 days in period) = -0.166667 days.
Final adjustment	Add the adjustments for the full periods and the partial period to calculate the final adjustment: (-3.75 days) + (-0.166667 days) = -3.916667 days.
Final adjustment applied	Apply the final adjustment to Oscar's current balance of 20 days: 20 days - 3.916667 = 16.083333 days.

Summarized calculation: 20 days - [(10 days/24 periods) * (9 full periods + (6 days left in period/15 days in period))] = 16.083333 days.

Next Steps

(Optional) Use the **Maintain Accrual and Time Off Adjustments/Overrides** task to confirm the adjustment amount on the **Automated Adjustments** tab. If needed, use the task to create a manual adjustment or override.

Related Information
Tasks

Edit Business Processes

Steps: Prorate Based-On-As-Of-Date Balances

Context

You can prorate balances, to the day, that workers receive at the start or end of a period when their eligibility for accruals changes within a period. Based-on-as-of-date, accruals support single and multiple changes in eligibility within a period.

Steps

1. Add the *Automated Accrual Adjustment* service step to the *Change Job* business process.

   The service step automatically prorates any time off balances that the worker has, based on the effective date of the job change.

   See Set Up Rule Based Consolidated Templates for Job Changes on page 767.
2. Create or edit an accrual that uses the **Based on As of Date** option.

   See Create Based-on-As-of-Date Accruals on page 2171.
3. Ensure that the **Accrual Frequency Method** for the time off plan is set to either *Start of Period* or *End of Period*.
   a) Access the **Edit Time Off Plan**.
   b) Check the **Calculation** tab for the value of the **Accrual Frequency Method**. If the value is:
      - Either *Start of Period* or *End of Period*, you don't need an override.
      - *Custom Frequency*, or different than in the accrual, override the time off plan setting:
        1. On the **Balance** tab, select **Overrides Allowed**.
        2. On the **Accrual** tab, edit the accrual and select the **Adjustments/Overrides Allowed** check box.
        3. On the **Time Off Plan Overrides** tab, create an override with either *Start of Period* or *End of Period* as the **Accrual Frequency Method**.

Result

When a worker has a job change within the period that affects their eligibility for the accrual, Workday calculates the proration based on the as of date. Workday creates an accrual adjustment for the period.

Example

Single Adjustment

Oscar works at Global Modern Services in the United Kingdom. Employees have an accrual of 2 days each month if full time; otherwise, they have an accrual of 1.2 days each month. Employees receive the accruals at the start of the period, using a monthly period schedule. On October 23, Oscar changes from a part-time to a full-time position. To reflect the amount of time he spent in each position, Workday adjusts his accrual to 1.4322.

Calculation Details

Adjustment	Calculation
Start of Period	Oscar receives 1.2 days of accrual at the beginning of the period. For the first part of the period (22 days), Oscar works as a part-time employee and receives an accrual balance of 0.8516 days. (1.2/31)*22 = 0.8516
Change During the Period	Within the period schedule, Oscar changes to full-time for 9 days.

Adjustment	Calculation
	(2/31)*9 = 0.5806
Updated Accrual Balance for the Period	Oscar receives an updated accrual balance of 1.4322 at the Start of Period. 0.8516 + 0.5806 = 1.4322
Automated Accrual Adjustment	For the final accrual adjustment, Workday subtracts the Start of Period accrual balance from the new accrual balance. The line item adjustment on the Automated Adjustments tab for Oscar is 0.2322 = (1.4322 - 1.2).

Next Steps

(Optional) Use the **Maintain Accrual and Time Off Adjustments/Overrides** task to confirm the adjustment amount on the **Automated Adjustments** tab. If needed, use the task to create a manual adjustment or override. Time off balances update wherever Workday displays the balances.

Related Information
Tasks

Edit Business Processes

Examples

Example: Multiple Eligibility Adjustments Within a Period on page 2325

Override Time Off Plan Balances

Prerequisites

- Configure the time off plan to track balances and enable overrides.
- Security: *Worker Data: Time Off (Time Off Balances)* domain in Time Off and Leave functional area.

Context

Override a worker's time off plan balance or a carryover balance.

When you override a worker's time off plan balance, Workday doesn't update the balance again for dates on or before the override date, including retroactive time off entries. You can prevent users from entering time off requests for dates before the balance override date. Add the *Time Off Date before Maximum Override Balance Date Not Allowed* validation to the time off.

To override the time off plan balances for a group of workers with balances that third-party applications maintain, use the *Put Override Balance* web service. Verify that balances loaded correctly with the **View Override Balances by Batch ID** report. If necessary, use the **Delete Override Balances by Batch ID** task to delete uploaded balances.

Steps

1. Access the worker's **Time Off Balance** report and make a note of the balance and carryover balances for the time off plan.
2. Access the **Maintain Time Off Plan Override Balances** task for the worker.

   Note: Don't use this task to override expiration rules defined on an accrual. Instead, access the **Maintain Accrual Expiration Overrides** task to handle accrual expiration exceptions or special employee circumstances. See Override Accrual Expiration Dates for a Worker on page 2175.

3. As you complete this task consider:

Field	Description
Time Off Plan	Select the plan that you want to override from the plans that the worker is eligible for today, in the past, or in the future. Workday categorizes the plans that the worker is: • Eligible for as of today. • Not eligible for as of today.

Override Balance Date	Select the date for which you want to override the plan balance or carryover balance. Workday overrides balances as of the period start date. This prompt displays the start date for periods in which the worker is eligible. If the eligibility rules evaluate as of the period end date, the worker isn't eligible as of today, so the period start date won't be available for selection. For time off plans:
	• With an **Accrual Frequency Method for Time Off Plan** option of *Custom Frequency*, select from the start date of the period to override:
	  • The balance carryover date.
	  • Any date on which the accrual can occur.
	  • The balance carryover expiration date.
	• Without a custom accrual frequency, select from the start date of the period to override any carryover expiration date.

Position	(Optional) The worker's position for position-based time off plans.
Units	A positive or negative number for the new balance amount. For any balance that you don't want to change, enter the current amount that you recorded in step 1. Workday sets the balance to zero if you don't enter a value.

Next Steps

Select the **View Calculated and Override Balances** from the worker's related action menu to see override balances for a worker.

Access the **View Override Balances for Organization** report to view all workers with a time off plan balance override by organization.

Related Information

Concepts

Concept: Eligibility for Time Off Plans, Time Off, and Accruals on page 2142

Setup Considerations: Period Schedules on page 2156

Tasks

Create Time Off Plans That Track Balances on page 2126

Reference

FAQ: Time Off Balances on page 2327

Examples

Example: Define Eligibility for a Time Off Plan on page 2192

Manually Schedule Storage of Time Off Balances

Prerequisites

- Configure time off plans to track balances.
- Security: *Process: Calculated Balances (Run)* domain in the Time Off and Leave functional area.

Context

You can manually schedule processes to store time off balances and accrual amounts for time off plans to:

- Optimize performance for time off transactions and reports.
- Provide balances for payroll processes of earnings mapped to time off.

Workday uses stored balances as a starting point for calculating balances for subsequent dates, instead of returning to each worker's initial processing period.

Note: To maintain a minimum level of performance, Workday checks every month whether a time off plan has stored balances as of a date within the previous 13 months. If it hasn't, Workday automatically stores balances as of 13 months before the third Sunday of that month. However, for optimal performance, Workday highly recommends that you manually schedule processes customized for your time off plans and business requirements.

Steps

1. Access the **Schedule Time Off Calculated Balance Process** task.
2. In the **Run Frequency** field, specify when you want the process to run.
3. On the **Time Off Plans** tab, specify:

Field	Description
Process Name	Example: *All Time Off Plans with an Annual Period Schedule*.
Time Off Plans	You can process plans with different period schedules together. Example: Plans with a monthly period schedule and plans with a quarterly period schedule. For the best performance, include each plan in 1 schedule only.

4. If you selected *Run Now* or *Run Once in the Future*, specify how far back in time you want to store balances.

   Count the number of days between the current date (or the future run date) and the period for which you want to store balances. Enter the result in the **Days Before Run Date** field. Workday calculates and stores balances for the first date of that period.

   Don't run the process for the current period or future periods. The **Days Before Run Date** shouldn’t be set to zero. As a best practice, set this value to 91 days or more.

   Example: Your time off plan has a monthly period schedule. Today is 2020-11-11 (the run date) and you want to store balances for the plan December 2019 period. You determine that there are 315 days from 2019-12-31 and today, and 345 days from 2019-12-01 to today. So, you enter a number from

315 to 345 in the **Days Before Run Date** field. When the process runs, Workday calculates and stores balances for 2019-12-01.

5. If scheduling the process to run later, enter instructions on the **Schedule** tab and click **OK**.

   When you click **OK**, the process runs immediately unless you scheduled it to run in the future.

Result

When the process runs, Workday calculates and stores the updated balances and accrual amounts.

After the process completes, it automatically recalculates and stores balances and accrual amounts in response to retroactive absence-related transactions for a worker. Example: Time off and leave requests entered for dates before you last ran the process. Workday doesn't recalculate balances and accrual amounts in response to:

- Job changes entered after the fact.
- Retroactive configuration changes to time off, accruals, or time off plans.

Example: After you run the process on April 1, Kevin enters time off for March 15. You also increase the accrual rate for vacation time to 4 extra hours a month for all workers, effective March 1. Workday automatically recalculates and stores Kevin's time off balances to reflect his March 15 day off. Workday doesn’t recalculate balances or accrual amounts in response to the accrual change.

Example

These examples demonstrate scheduling options for storing balances:

Run once a year on the second Friday of February.	• **Run Frequency** = *Monthly Recurrence* • **Month(s)** = *February* • **Recurrence Type** = Day of the Week: *Second Friday* • **Start Time** = *12:30 AM*
Run on the last day of each calendar quarter.	• **Run Frequency** = *Monthly Recurrence* • **Month(s)** = *March, June, September, December* • **Recurrence Type** = Day(s) of the Month: *Last Day of the Month* • **Start Time** = *12:30 AM*
Run at midnight tonight for a prior period (a catch-up run).	You have 3 monthly time off plans that have been in use for 2 years. You've never run the process. To catch up, you decide to store balances as of 1 year ago. Enter these values the first time you run the process: • **Run Frequency** = *Run Once in the Future* • **Days Before Run Date** = 365 • **Start Time** = *12:00 AM* Run once more for a more recent period and then schedule the process to run on a recurring basis.

Next Steps

- To edit or delete a schedule with a recurring frequency, access the **View Schedules for Time Off Calculated Balance Process** report.

- To cancel a run or remove stored balances, use the **Cancel Time Off Calculated Balances Run** task.

  When selecting the run, check the run date displayed after the process name to ensure that you cancel the correct run.

Related Information
Concepts

Concept: Guidelines for Storing Time Off Balances on page 2319

Reference

FAQ: Time Off Balances on page 2327

The Next Level: Store Absence Balances

View and Edit Schedules for Storing Time Off Balances

Prerequisites

Security: *Process: Calculated Balances (Run)* domain in Time Off and Leave functional area.

Context

View, edit, or delete manually scheduled *Time Off Calculated Balance* processes. You can also check the next and last run dates for schedules with a recurring frequency and view the list of plans not included in a schedule.

Steps

1. Access the **View Schedules for Time Off Calculated Balance Process** report.

   Expired plans (plans without a **Next Run Date**) are listed first.
2. Click:

   - **Edit** to extend the end date for an expiring plan or make other edits.
   - **Delete** to delete the schedule, but not the results of previous runs.
   - **View Last Results** for the number of balances last updated for each plan and to access the list of workers processed.
   - **View Process Monitor** to see processing results for runs within a selected date range.

   Note: All users secured to the *Process: Calculated Balances (Run)* domain can edit information on the **Schedule** tab, but only the schedule owner can edit the **Time Off Plans** tab or delete a schedule. The schedule creator can transfer ownership to another user by accessing the **Scheduled Future Processes** task. From the request name, select **Scheduled Future Process** > **Transfer Ownership** from the related actions menu of the request name.

Related Information
Concepts

Concept: Guidelines for Storing Time Off Balances on page 2319

Tasks

Manually Schedule Storage of Time Off Balances on page 2312

Remove Stored Balances

Prerequisites

Security: *Process: Calculated Balances (Run)* domain in the Time Off and Leave functional area.

Context

Remove stored balances that are incorrect by canceling a run of the *Calculate Time Off Balances* process. Stored balances can be incorrect if you make a retroactive job change that is effective before a stored balance date. They can also be incorrect if you make an absence-related configuration change after storing balances.

You might need to cancel an entire run if you make retroactive changes that affect a large number of workers. Example: You retroactively change a time off plan accrual rate, effective before the last time the plan balances were stored. Everyone who uses that time off plan will have incorrect balances unless you remove the balances from the last run.

If you make a retroactive change for an individual worker, use the **Schedule Time Off Calculate Balance Process** task instead to recalculate that worker's balances.

Steps

1. (Optional) Verify the time off plan and balance date for which you need to remove balances.

   Select **Time and Absence** > **View Calculated and Override Balances** from a worker's related actions menu.

   The **Balance Date** on the report is the date that the balances were stored as of, not the date the balances were stored.

   Example: If on 2019-06-01 you stored balances as of 2018-05-01, the **Balance Date** is 2018-05-01.
2. (Optional) Identify the time off calculated balances run that includes the balances you need to remove.
   a) Access the **Cancel Time Off Calculated Balances Run** task.

      The dates displayed in the **Calculated Time Off Balance Run** prompt are when processes ran, not the dates that the balances were stored as of.

      Example: If on 2020-06-01 you stored balances as of 2019-05-01, the date displayed in the prompt is 2020-06-01.
   b) From the related actions menu of a run, select the name of the background process.
   c) Verify that the run includes the time off plan and balance date for which you need to remove balances.
3. Access the **Cancel Time Off Calculated Balances Run** task.

   Cancel the run that includes the incorrect balances.

   Note: Canceling a run removes all of the balances that were stored in that run, not just the incorrect balances. You might need to recalculate balances for all workers with removed balances.

Result

Workday removes the balances stored in the canceled run. Workday then uses the balances stored previous to the canceled run to calculate balances for the affected workers.

Next Steps

If you want to recalculate stored balances for a different date, use the **Recalculate Worker Time Off Balances** task to recalculate balances for each worker.

Recalculate Balances for Workers

Prerequisites

- Configure the worker's time off plan to track balances.
- Security: *Process: Calculated Balances (Run)* domain in the Time Off and Leave functional area.

Context

Manually recalculate a worker's or multiple workers' balances when you:

- Make a retroactive job change that is effective before the worker's last stored time off balance date.

- Make an absence-related configuration change after storing balances.

Recalculating the worker's balances after a retroactive change ensures that the stored balance and the relevant calculations are correct.

Example: You retroactively promote Kevin to a new position that has a higher accrual rate, effective as of February 15. His time off plan balances are stored on March 1 and don't automatically take into account his new accrual rate. As a result, you must manually recalculate his balances with a start date that is before February 15.

Steps

1. Access the **Recalculate Worker Time Off Balances** task.

   As you complete the **Worker** section, consider:

Option	Description
Run for All Workers	Workday recommends that you don't run this process for all workers as it can impact performance.
Run for All Time Off Plans	Workday recommends that you don't run this process for all time off plans as it can impact performance.
Start Date	If recalculating balances due to a retroactive change, select a date that is before or on the effective date of the retroactive change. If recalculating balances due to absence-related configuration changes such as accrual calculation or eligibility, select a date that is either: • The same as the effective date of the change. • Before or on the effective date of the change. Select a date that is less than 18 months in the past from the current date for optimum tenant performance.

2. (Optional) Complete the **Schedule** section to run the process on a future date.

Result

Workday recalculates the worker's balance and stores it as of the period. Workday also persists accrual amounts in the 6-month period before the date the balance is stored.

Related Information
Concepts
Concept: Guidelines for Storing Time Off Balances on page 2319
Tasks
Steps: Set Up Job Changes on page 758
Reference
FAQ: Time Off Balances on page 2327

Create Absence Balances

Prerequisites

Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in Time Off and Leave functional area.

Context

Create balances for calculating accrual, time off, or other absence values over a balance period that differs from the standard time off plan year.

If you're defining time off plan balances (accruals less time off), use the **Create Time Off Plan** task.

Steps

1. Access the **Create Absence Balance** task.
2. In the **Absence Calculation** field, select the accrual, time off, or time off plan for which you want to define a balance.
3. Select a **Balance Period** to specify over what time period to accumulate the values.

   Workday recommends that you reference a prior period to avoid an infinite loop error.
4. (Optional) Select the **Calculate as of Balance Period End Date** check box.

   When you select the check box, Workday calculates to the end of the period instead of stopping at the as of date. Example: Select the check box to calculate the balance to the end of the year if an absence balance has a calculation period of *YTD - Current Calendar Year (based on Period End Date)*.

   Note: Selecting this check box can can lead to issues such as stack-trace or calculation errors when you also use the absence balance in an accrual calculation.

Example

You created a time off called *Sick Time* and want to create a balance that returns the amount of sick time taken over the last 3 months.

1. Select *Sick Time* in the **Absence Calculation** field.
2. In the **Balance Period** field, specify an accumulation period of the last 3 months.
3. Leave the **Calculate as of Balance Period End Date** check box unselected.

Related Information
Tasks

Create Time Off Plans That Track Balances on page 2126

Concept: Balance Projections for Time Off

Balance Projections

You can use the **Projected Balances** section to view a worker's:

- Current time off balances.
- Project future balances.

Workday displays the **Projected Balances** section on these items in **My Tasks**:

- Revise time off requests.
- Review time off corrections.
- Revise time off corrections.

Projected balance information displays only for time off plans that track balances. The grid lists the time off plans and related time offs the worker is eligible for, such as floating holiday or vacation. For each plan, it displays these balances:

Field	Description
Available	Available hours or days in the worker's time off plan balance, up to and including the date shown in the **The projected balances below are calculated as of** date field.

Field	Description
	Available time off = Accrued time - (Approved + Pending time off requests). Requests with a status of Saved for Later don’t display.
Requested	Hours or days in the current time off request.
Remaining	Available hours or days minus paid hours or days in the current request up to and including the date shown in the **The projected balances below are calculated as of** date field. An exception to this rule can apply when the time off plan has a lower time off limit.
Unpaid	Unpaid hours or days in the current request. Only displayed to users reviewing submitted time off requests or corrections.

Values are current as of the date displayed above the **Projected Balances** grid and take into account termination adjustments, if they exist.

How Workday Calculates Remaining Time

Available time - **Requested** time = **Remaining** time.

If the worker's time off request falls below the lower limit defined for the time off plan balance, the **Remaining** balance displays the lower limit.

Example 1: Time Off Lower Limit = zero

The *Vacation* time off plan enables workers to take unpaid vacation when they deplete their plan balance. The time off plan has these settings:

- Time off lower limit = Zero
- Unpaid Time Allowed? = Yes

If Morgan's balance is 6 hours and she requests 8 hours of time off, Workday displays these projected balances:

Available	Requested	Remaining	Unpaid (only visible to reviewers)
6	8	Zero	2

Example 2: Time Off Lower Limit = -4

The *Sick* time off plan enables workers to take up to 4 additional hours of paid sick time. The time off plan has these settings:

- Time off lower limit = -4
- Unpaid Time Allowed? = Yes

Amit's sick time balance is 6 hours and he requests 8 hours of sick time off. Workday displays these projected balances:

Available	Requested	Remaining	Unpaid (only visible to reviewers)
6	8	-2	Zero

If Amit requests 12 hours instead or 8, his balances display as:

Available	Requested	Remaining	Unpaid (only visible to reviewers)
6	12	-4	2

How Corrections Affect Balance Projections

When you correct an approved time off request, the **Requested** balance displays the difference between the amount of time originally requested and the corrected amount.

Example:

- If you increase the original request from 4 hours to 6, the **Requested** field displays +2.
- If you decrease the original request from 6 hours to 4, the **Requested** field displays -2.

The **Available** balance reflects the previously approved time off request.

Related Information
Reference

FAQ: Time Off Balances on page 2327

Concept: Guidelines for Storing Time Off Balances

Workday calculates time off plan balances and accrual amounts dynamically based on time off plan rules when workers access time off tasks and reports in your tenant. Workday accesses reports in the background that run calculations from a specific point in time to access the balance values.

All workers have time off history. Workday pulls many events into their worker profile, including time off events, accruals that accumulate, and carryover from balance period to balance period. Workday accesses the same information at different speeds, depending on whether you configure Workday to store balances:

- If you don't configure the tenant to store balances, processing takes much longer. If there isn't a specific point in time to reference, Workday runs calculations starting from when balances were first entered in Workday. Workday has to go back to the workers' initial history to calculate all of the absence components and output their absence balance results.
- In contrast, if you store balances at intervals, when workers access their time off plan balances, Workday displays calculated results from the most recent stored balances. Because Workday is using a more recent date, the processing time is much faster, providing a better, more efficient user experience.

To optimize performance, you can schedule processes to store balances on a regular basis for all time off plans that track balances. When you use the **Schedule Time Off Calculated Balance Process** task to store balances as of 91 days or more and accruals, Workday uses the stored balances and accrual amounts as the starting point for subsequent dynamic calculations.

You can store balances as of the start date of any period within the time off plan's period schedule. You can't store balances for a future date.

If you experience performance issues related to absence, use the **View Schedules for Time Off Calculated Balance Process** report to check whether you have schedules for storing time off balances. If not, create them.

Best Practices for Performance

To maintain a minimum level of performance, Workday checks every month whether a time off plan has stored balances as of a date within the past 13 months. If not, Workday automatically stores balances as of 13 months before the third Sunday of that month. However, Workday recommends that you manually schedule processes customized for your time off plans and business requirements.

We recommend that you:

- Don't store balances as of today's date.
- Run the **Schedule Time Off Calculated Balance Process** as of 91 days or more. When storing balances, Workday uses the period start date, derived from the plan's period schedule.
- Don't run the **Schedule Time Off Calculated Balance Process** more often than the frequency of your period schedule. Examples: If the period schedule for the time off plan is:
  - Biweekly. You can run the process biweekly. Don't run the process weekly.
  - Monthly. You can run the process monthly or less often than monthly. Don't run the process weekly or biweekly.
  - Quarterly. Run the process every 3 months. Don't run the process weekly, biweekly, or monthly.

  Note: Don't run the process for the current period. Set the value of **Days Before Run Date** to greater than zero. As a best practice, set to 91 days or more. The main benefit of setting the value to 91 days or more is to ensure that Workday stores the accrual, which further improves performance.
- Edit the schedule of the job to process fewer plans at the same time or increase the recurrence frequency.
- Schedule the process to run at night.

  Note:

  For initial Workday deployment projects or for Mergers and Acquisitions, consider the order of operations as this can impact processing times for calculations. For optimal performance, when loading balances for terminated workers to your Workday tenants, Workday recommends performing these steps in this order:

  1. Load time off
  2. Store balances.
  3. Terminate worker.
- Use Import web services for time off and absence for high-volume record transactions of more than 2000 rows per load.
- Be mindful of reporting schedules and synching them up. Ensure that you run reports before running scheduled time off calculated balances. Run your reports quarterly and calculate stored balances at least quarterly. Providing a starting point to calculate balances helps the reporting framework recall the information. If you're running quarterly company-wide Absence accrual reports, it's better to run the reports close to the time after your recent scheduled stored balance run. Custom reports and indexed data sources, such as Workers for HCM Reporting, are key considerations for efficient performance, helping to recall absence balances stored in a more performant way.
- If your organization has more than 100,000 active HCM workers, you should review your tenant performance because of the volume of transactions that you're likely to have. Supporting this number of workers can require additional attention to assess tenant run time and end-user experiences.
- Run the **Schedule Time Off Calculated Balance Process** process after employees have finished entering time off for the period.

  Example: Wait until employees enter their time off at the end of the year before running the process for December. This method reduces the number of times Workday must recalculate and store balances in response to retroactive entries.

Tenant Setup

Review how the Absence worklet displays balances. If you notice that they're taking a long time to load, or the worklet is taking a long time to populate, consider accessing the **Edit Tenant Setup - HCM** task and navigate to the **Time Off** section. Select the **Disable Absence Worklet Balances** option. Workers can continue to view their balances on the calendar when they view their absences or request absence.

Review your tenant settings for Payroll. Access the **Edit Tenant Setup - Payroll** task, navigate to the **Payslips** section, and enable the **Persist Absence Data for Payslips** options to improve performance for payslips and the web service for *Get Payroll Payslips*. The persistence occurs between pay calculation and pay completion. Workday looks at the persisted absence data from the pay result, except when the payroll was completed before you enabled the option.

Performance Impacts

These factors add to the complexity of time off balance calculations. Consider whether you must run the process more often for some or all plans:

- Period schedule frequency. Example: Weekly or monthly. Don't use daily period schedules in time off plans. Workday recommends that you select a weekly schedule at a minimum.
- Limits: upper, lower, and carryover.
- Multiple accruals associated with the balance.
- Multiple time offs associated with the plan.
- Plan balance that is dependent on another plan balance.
- Number of periods processed in the period schedule.
- Number of employees eligible for the plan. Configure country eligibility on time off plans or holiday calendars.
- Volume of overrides and adjustments.
- Volume of time off requests with time calculations entered through Workday Time Tracking.
- Volume of time off and corrections loaded through web services.

Some general recommendations:

- Include each plan in 1 schedule only.
- Consider storing balances for complex accruals, and for those that use rolling accruals. Not doing so can adversely impact tenant results and run times.
- Ensure that period schedules are limited to only the length of time needed to load balances for workers. Creating period schedules too far in the past, and not consistently storing those balances, results in Workday taking longer to dynamically calculate balances.
- Ensure that you're using advanced lookup table calculations.
- When you use *Time Off Paid* Absence Component Related Calculations (ACRCs), these calculations need to evaluate other calculations, such as the lower limit to return a value. Often, it isn't necessary to use this ACRC if the plan is using a lower limit and the **Maximum Unpaid Time Off Units Allowed** validation. If possible, use the *Time Off Total* ACRC instead, as this doesn't evaluate other calculations.
- Review your security configurations. Complex configurations on Absence-related domains and business process security policies can impact access to tasks and business processes.

Integrations

Many integrations use the reporting framework to retrieve data for external web services. If balances aren't stored and the web service runs, this can impact run times of scheduled integrations. Consider the performance impact for the tenant pushing or pulling information for inbound and outbound transactions.

For outbound transactions, check whether the integration is accessing balances based on a period of time. The amount of data and timeframe can impact performance. If possible, try to limit those timeframes. If you know that an integration takes a long time to run, consider running the integration at a different time, or whether storing balances can make the integration go faster.

Related Information

Tasks

Manually Schedule Storage of Time Off Balances on page 2312

Reference

Workday Community: Augmenting Absence for Optimal Performance

The Next Level: Store Absence Balances

Example: Transfer Time Off Balances

This example illustrates how you can transfer time off balances when a worker's eligibility for a time off plan changes.

Context

Alan is moving from San Francisco to Copenhagen, effective 2020-02-16. He currently has time off balances on these plans:

Time Off Plan	Time Off Plan Balance
USA Paid Time Off Plan (Salaried)	103.125 hours
Floating Holiday Plan	6.25 hours
USA Sick Plan	2.5 hours
USA Vacation Plan	7.5 hours

Effective 2020-02-16, he's eligible for the DNK Vacation Plan.

You need to:

- Transfer all balances from Alan's previous time off plans to the DNK Vacation Plan.
- Pay 2 hours (0.25 days) of balance from Floating Holiday Plan to the DNK Vacation Plan.

Prerequisites

Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area.

Change Alan's work location from San Francisco to Copenhagen.

Field	Value
When do you want this change to take effect	*02/16/2020*
Why are you making this change	*Change Location*
Where will this person be located after this change	*Copenhagen*
Employee Type	*Regular*
Time Type	*Full Time*
FTE	*100%*
Company	*Global Modern Services (Denmark)*
Region	*EU-Northern*

Steps

1. Select **Business Process** > **Edit Definition** from the related actions menu of the *Change Job* business process.
2. Click **OK**.
3. On the **Business Process Steps** tab, add 2 rows and select these options:

Type	Specify	Group
Action	*Maintain Time Off Plan Transfer Balance*	• *Absence Administrator* • *Absence Partner*
Action	*Update Time Off Requests*	• *Absence Administrator* • *Absence Partner* • *Manager*

4. Click **OK**.
5. Access the **Maintain Time Off Unit of Time Conversion Calculations** task.
6. Select *Create Arithmetic Calculation* from the **Hours to Days** prompt.
7. On the **Create Arithmetic Calculation** page, enter these values:

Field	Value
Name	Hours to Days
Category	*Absence*
1st Operand	*1*
Operator	*Divide*
2nd Operand	*8*

8. Select *Create Arithmetic Calculation* from the **Days to Hours** prompt.
9. On the **Create Arithmetic Calculation** page, enter these values:

Field	Value
Name	Days to Hours
Category	*Absence*
1st Operand	*1*
Operator	*Multiply*
2nd Operand	*8*

10. Access the **Edit Time Off Plan** task.
11. Select *USA Paid Time Off Plan (Salaried)* from the **Time Off Plan** prompt.
12. Select *DNK Vacation Plan* from the **Balance Transfer Default(s)** prompt on the **Balance** tab.
13. Click **OK**.
14. Access the **Edit Time Off Plan** task.
15. Select *Floating Holiday Plan* from the **Time Off Plan** prompt.
16. Select *Floating Holiday Time Off* from the **Time Off for Balance Transfer Adjustment** prompt on the **Time Off** tab.
17. Click **OK**.
18. Access the **Maintain Time Off Plan Transfer Balances** task in**My Tasks**.

19. Select **USA Paid Time Off Plan (Salaried)**.

Workday:

- Converts *103.125 hours* to *12.890625 days*.
- Transfers the time off balance from *USA Paid Time Off Plan (Salaried)* to the default time off plan, *DNK Vacation Plan*.

20. Click **Floating Holiday Plan**.

21. In the **Transfer To** grid, add a row for the *DNK Vacation Plan* and select these values:

- **Units**: *0.53125* (4.25 hrs / 8)
- **Unit of Time**: *Days*

22. Enter *0.25* (Days) **Units to Payout** in the **Payout Adjustment** section.

23. Click **USA Sick Plan**.

24. In the **Transfer To** grid, add a row for the *DNK Vacation Plan* and select these values:

- **Units**: *0.3125* (2.5 hrs / 8)
- **Unit of Time**: *Days*

25. Click **USA Vacation Plan**.

26. In the **Transfer To** grid, add a row for the *DNK Vacation Plan* and select these values:

- **Units**: *0.9375* (7.5 hrs / 8)
- **Unit of Time**: *Days*

27. Click **Submit**.

If you transfer balances for more than 1 plan, Workday validates multiple transfers when you submit the time off transfer balance request.

Result

Alan's new time off plan, *DNK Vacation Plan*, contains a balance of *14.671875 days*.

Next Steps

(Optional) You can view or edit Alan's balance in his previous and new time off plans using the **Maintain Time Off Override Balances** task.

You can run the **Maintain Accrual and Time Off Adjustments/Overrides** task to view or edit the payout adjustment on the Floating Holiday Plan.

Related Information

Tasks

Steps: Transfer Time Off Balances on page 2305

Change Location on page 783

Edit Business Processes

Example: Single Eligibility Adjustment Within a Period

Context

At Global Modern Services in the United States, full-time employees have a vacation accrual of 12 hours each 2-week period. Otherwise, they have an accrual of 6 hours each period. This example displays in-period adjustments for Alex, who goes part-time midperiod. We compare the adjustments for the accrual with both Start of Period or End of Period accrual frequency methods.

As the absence administrator, you've added the Automated Accrual Adjustment service to the **Change Job** business process to enable Based-on-As-of-Date accruals. You've also configured a semi-monthy time off plan and an accrual with these settings:

- The Accrual Period is 12/1/17 - 12/15/17.

- Semi-Monthly (Worker Based) Time Off Plan > **Type**: *Hours*
- Semi-Monthly (Worker Based) Accrual:
  - **Calculation** Tab:
    - **Calculation**: Accrual = 12 when Time Type is Full Time, otherwise Accrual = 6
    - **Adjustments/Overrides Allowed**: Selected
    - **Options**: *Based on As of Date*
    - **Schedule** is blank
  - **Time Off Plan Overrides** Tab:
    - **Accrual Frequency Method**: *Start of Period* or *End of Period*

Steps

1. On 12/14, you run the *Change Job* business process to convert Alex from a full-time to a part-time worker.
2. Workday processes the change in eligibility by:
   - Adjusting the period accrual from full-time to part-time for the last 2 days in the period.
   - Automatically adjusting the accrual balance at either the Start of Period or End of Period.

Result

Activity	**Accrual Frequency Method: Start of Period**	**Accrual Frequency Method: End of Period**
Eligibility Change 1: 12/14/17	***Full-Time to Part-Time***	***Full-Time to Part Time***
Full-Time Accrual	10.4 hours = (12 hrs / 15 days) * 13 days	10.4 hours = (12 hrs / 15 days) * 13 days
Part-Time Accrual	0.8 hours = (6 hrs /15 days) * 2 days	0.8 hours = (6 hours / 15 days) * 2 days
Adjusted Period Balance (Sum of 2 Accruals)	11.2 hours = 10.4 hours + 0.8 hours	11.2 hours = 10.4 hours + 0.8 hours
First Line adjustment on the **Automated Adjustments** tabs for Period (Adjusted Period Balance - Original Accrual)	-0.8 hours = 11.2 hours -12 hours	5.2 hours = 11.2 hours - 6 hours

Related Information

Tasks

Steps: Prorate Based-On-As-Of-Date Balances on page 2309

Example: Multiple Eligibility Adjustments Within a Period

Context

At Global Modern Services in the United States, full-time employees have a vacation accrual of 12 hours each 2-week period. Otherwise, they have an accrual of 6 hours each period. This example displays in-period adjustments for Tony, who briefly goes part-time midperiod, and then returns to full-time. We compare the adjustments for the accrual with both Start of Period or End of Period accrual frequency methods.

As the absence administrator, you've added the Automated Accrual Adjustment service to the **Change Job** business process to enable Based-on-As-of-Date accruals. You've also configured a semi-monthly time off plan and an accrual with these settings:

- The Accrual Period is 12/1/17 - 12/15/17.
- Semi-Monthly (Worker Based) Time Off Plan > **Type**: *Hours*
- Semi-Monthly (Worker Based) Accrual:
    - **Calculation** Tab:
        - **Calculation**: Accrual = 12 when Time Type is Full Time, otherwise Accrual = 6
        - **Adjustments/Overrides Allowed**: Selected
        - **Options**: *Based on As of Date*
        - **Schedule** is blank
    - **Time Off Plan Overrides** Tab:
        - **Accrual Frequency Method**: *Start of Period* or *End of Period*

Steps

1. On 12/11, you run the *Change Job* business process to convert Tony from a full-time to a part-time worker.

    Workday processes the change in eligibility by:

    - Adjusting his period accrual from full-time to part-time for the last 5 days in the period.
    - Automatically adjusting the accrual balance at either the Start of Period or End of Period.
2. On 12/14, Tony goes back to full-time status and you run the *Change Job* business process again.

    Workday processes the change in eligibility by:

    - Adjusting his eligibility from part-time back to full-time for the last 2 days of the period.
    - Automatically adjusting the balance for the period at either the Start of Period or End of Period.

Result

Activity	Accrual Frequency Method: Start of Period	Accrual Frequency Method: End of Period
Eligibility Change 1: 12/11/17	***Full-Time to Part Time***	***Full-Time to Part Time***
Full-Time Accrual	8.0 hours = (12 hours / 15 days) * 10 days	8.0 hours = (12 hours / 15 days) * 10 days
Part-Time Accrual	2.0 hours = (6 hours /15 days) * 5 days	2.0 hours = (6 hours /15 days) * 5 days
Adjusted Period Balance (Sum of 2 Accruals)	10 hours = (8.0 hours + 2.0 hours)	10.0 hours = 8.0 hours + 2.0 hours
First Line adjustment on the **Automated Adjustments** tab. (Adjusted Period Balance - Original Accrual)	-2.0 hours = (10.0 hours - 12 hours)	4.0 hours = (10.0 hours - 6 hours)
Eligibility Change 2: 12/14/17	***Part-Time to Full-Time***	***Part-Time to Full-Time***
Full-Time Accrual	8.0 hours = (12 hours / 15 days) * 10 days	8.0 hours = (12 hours / 15 days) * 10 days
Part-Time Accrual	1.2 hours = (6 hours / 15 days) * 3 days	1.2 hours = (6 hours / 15 days) * 3 days
Full-Time Accrual	1.6 hours = (12 hours / 15 days) * 2 days	1.6 hours = (12 hours / 15 days) * 2 days

Activity	Accrual Frequency Method: Start of Period	Accrual Frequency Method: End of Period
Adjusted Period Balance (Sum of 3 Accruals)	10.8 hours = 8.0 hours + 1.2 hours + 1.6 hours	10.8 hours = 8.0 hours + 1.2 hours + 1.6 hours)
Second Line Adjustment on the **Automated Adjustments** tab for **Start of Period** (Adjusted Period Balance - First Adjusted Period Balance)	0.8 hours = 10.8 hours – 10.0 hours	N/A
Second Line Adjustment on the **Automated Adjustments** tab for **End of Period** (Adjusted Period Balance - (End of Period Accrual + First Line Adjustment))	N/A	-5.2 = 10.8 hours – (12 hours + 4.0 hours)

Related Information

Tasks

Steps: Prorate Based-On-As-Of-Date Balances on page 2309

FAQ: Time Off Balances

- What balances can Workday Absence Management track?
- How do I define balances in Workday Absence Management?
- How do I calculate and view carryover balances?
- What happens to balances when an employee is terminated?
- How do I specify the balance period for time off plan, accrual, and time off balances?
- Do I need to manually store balance values and accrual amounts?
- When does Workday automatically store balances?
- Why does the automatic process store balances as of 13 months before the run date?
- Why is the automatic process taking longer than usual?
- Will I notice anything when I use Workday while the automatic process runs?
- What happens if the automatic process fails?
- Does Workday adjust calculated balances for retroactive changes?
- How do I know if my tenant performance is impacted in terms of calculating and loading absence balances?

What balances can Workday Absence Management track?

For time off plans configured to track balances, Workday calculates and displays these balances on various pages and reports:

Balance	Description
Accrual	Accrued time off for the balance period.
Time Off	Time off taken during the balance period.
Time Off Plan	Accruals less time off for the balance period.
Carryover	Number of hours or days employees have carried over from 1 time

Balance	Description
	off plan balance period to the next.

You can specify the *balance period* on the **Create Time Off Plan** task.

How do I define balances in Workday Absence Management?

Workday automatically creates balances for accruals, time offs, the time off plan, and carryover, when you configure a time off plan as follows:

- Enable balance tracking on the **Balance** tab of the **Create Time Off Plan** or **Edit Time Off Plan** task by selecting the:
  - **Track Balance** check box.
  - Period of time over which to accumulate balances in the **Balance Period** field.
- Associate the accrual and time off calculations that add to and subtract from the plan balance on the **Calculation** tab.

Workday automatically carries over the unused balance of employee time off plans to the next plan year. You can limit or prevent carryover by entering a carryover **Limit** when setting up the plan.

See Create Time Off Plans That Track Balances on page 2126.

You can use the **Create Absence Balance** task to calculate a balance that is different from the plan. Example: You have a balance period of a year for the time off plan, but you want 1 of the time offs to be 1 month. The Absence Balance task helps you define the time frame to calculate a balance.

How do I calculate and view carryover balances?

Workday calculates carryover balance values dynamically when you access a report or page, unless the carryover **Limit** defined for the time off plan is zero. For optimal performance, use the **Schedule Time Off Calculated Balance Process** task to create a schedule for calculating and storing balances on a regularly.

To view carryover balances, use these reports:

- **Carryover Balances for Organization (by Worker)**
- **Carryover Balances for Organization (by Carryover Date)**

  Don't use these reports for time off plans that have a carryover date that varies by worker. Example: Plans with a balance period that is based on employee anniversary dates.

	See Concept: Guidelines for Storing Time Off Balances on page 2319 and Manually Schedule Storage of Time Off Balances on page 2312.
What happens to balances when an employee is terminated?	You can configure whether to forfeit or pay out balances to employees. To have Workday automatically create a termination adjustment that zeros out the employee time off plan balance, see Steps: Enable Termination Adjustments for Time Off Plans on page 2110.
How do I specify the balance period for time off plan, accrual, and time off balances?	Define the balance period for a time off plan on the **Create Time Off Plan** and **Edit Time Off Plan** tasks. Workday uses the balance period for a time off plan as the default balance period for the accrual and time off calculations that add to and subtract from the plan balance. Example: If the balance period for a vacation plan balance is year-to-date, the balance period for vacation accruals and time off is also year-to-date. If you must sum the same accrual, time off, or time off plan balance hours over a different period of time, use the Create Absence Balance task to associate the accrual, time off, and time off plan balance calculations with a different balance period. Because Workday doesn't hard-code balance periods in the calculations, you can match the same calculations with different balance periods as needed.
Do I need to manually store balance values and accrual amounts?	Workday recommends that you store balance values and accrual amounts by manually scheduling processes that you customize for your time off plans and business requirements. Workday does automatically store balances regularly, but only to ensure a minimum level of performance. As a best practice, manually configure your own processes to store balances. See Concept: Guidelines for Storing Time Off Balances on page 2319 and Manually Schedule Storage of Time Off Balances on page 2312.
When does Workday automatically store balances?	Workday automatically runs a process to store balances on the third Sunday of every month at 01:00:00 in your local time zone. If the most recently stored balance date of a time off plan is: • Less than 13 months before the run date: Workday doesn't store balances for that time off plan during that run. • Greater than 13 months before the run date: Workday stores balances as of 13 months

	before the run date and accrual amounts in the 6-month period before the stored balance date.
Why does the automatic process store balances as of 13 months before the run date?	The 13-month period allows for retroactive changes. Workday doesn't automatically recalculate balances for changes that are effective before the worker's last stored time off balance date such as: • Retroactive job changes. • Absence-related configuration. Example: Changes to accrual rates.
Why is the automatic process taking longer than usual?	Storing balances can take longer if you increase the volume or complexity of the data that Workday has to process. Example: You add time off plans for a significant number of workers and don't manually schedule processes to store balances for them. The automatic process might take noticeably longer to run than it did before.
Will I notice anything when I use Workday while the automatic process runs?	No, the automatic process runs in the background and shouldn't slow down Workday while it runs.
What happens if the automatic process fails?	Workday continuously monitors the automatic process. If a process fails, Workday: • First checks for internal issues before investigating your tenant configuration. • Communicates any necessary configuration changes to you.
Does Workday adjust calculated balances for retroactive changes?	It depends on the type of retroactive change and whether the change is effective before or after the worker's last stored balance date:

Retroactive Change Type	Effective Before Worker's Last Stored Balance Date	Effective After Worker's Last Stored Balance Date
Job changes or configuration changes to time offs, accruals, or time off plans.	No, you must manually remove the balances stored after the change and recalculate balances as of a date before the change. Example: You retroactively change Kevin's accrual rate, effective as of	Yes.

Retroactive Change Type	Effective Before Worker's Last Stored Balance Date	Effective After Worker's Last Stored Balance Date
	February 15. Workday most recently stored the balances of his time off plans as of March 1. As a result, you must manually remove his March 1 balances and recalculate his balances as of a date before February 15. See Recalculate Balances for Workers on page 2315.	
Absence-related transactions, such as time off requests or corrections.	Yes.	Not applicable. In this case, Workday doesn't need to recalculate balances. Workday takes the retroactive change into account when calculating balances from the last storage point.

How do I know if my tenant performance is impacted in terms of calculating and loading absence balances?

You might notice that Absence-related landing pages, reports, and tasks are taking too long to load or complete. Example:

- Viewing time off balances from your worker profile.
- Requesting time off or absence.
- Running pay calculations.
- Generating payslips that reference absence balances.
- Running integrations, EIBs, or web services that reference absence balances.

You might also experience time-out errors for Absence-related tasks.

When accessing reports that drive absence balances, if processing is taking too long, Workday requests that you output the results to your Drive.

If you experience performance issues related to absence, use the **View Schedules for Time Off Calculated Balance Process** report to check whether you have schedules for storing time off balances. If not, create them.

See Concept: Guidelines for Storing Time Off Balances.

Related Information

Concepts

Concept: Balance Projections for Time Off on page 2317

Concept: Guidelines for Storing Time Off Balances on page 2319

Tasks

Override Time Off Plan Balances on page 2310

Time Off Reports and Dashboards

Report Liability for Time Off

Context

Report the liability of an organization for time off balances. For the time off plans and date you select, Workday reports the plan balance and total liability for each worker. For workers paid in a different currency, Workday displays the liability in the currency paid.

Steps

1. Access the **Time Off Liability** report.
2. Select the **Hourly Frequency**, **Daily Frequency**, or both depending on the time off units (*Days* or *Hours*) the plans use.

   Workday uses the annualization factor defined for the selected frequency to determine the worker's hourly or daily rate for the report.

   - For plans that use days: Daily rate = worker's annual salary / annualization factor.
   - For plans that use hours: Hourly rate = worker's annual salary / annualization factor.

   Note: Workday calculates a worker's annual salary according to the same logic used by Workday Compensation.

   If you don't select an hourly or daily frequency, Workday calculates a worker's liability by multiplying the annual salary by the plan balance (hours or days).

   To view or edit frequencies and their corresponding annualization factors, use the **Maintain Frequencies** task.
3. Select the **As of Date** for the balances.

   Workday automatically populates current date.

Result

Workday reports the time off liability for the workers and time off plans that meet your selection criteria. The **Organization** column displays the supervisory organization for the worker's primary position.

Example

Aaron's annual salary is 50,000 USD. You can calculate the rate for Aaron's liability when you:

1. Create the **Time Off Liability** report for the hour-based Vacation time off plan.
2. Select an hourly frequency that has an annualization factor of 2080.

Liability rate: 50,000 / 2080 = 24.04

Enable Absence Administrator Home Worklet

Prerequisites

Security:

- *Set Up: Calendar* domain in the System functional area.
- *Set Up: Leave of Absence* domain in the Time Off and Leave functional area.
- *Set Up: Time Off* domain in the Time Off and Leave functional area.

Context

The Absence Administrator Home worklet acts as a central location for cards that display frequently used Absence tasks and reports. You must have access to both the card and the tasks on the card. Any tasks that you don't have access to will not display.

Steps

1. From the Workday Home page, click **Menu**.
2. Click **Add Apps**.
3. In the **Find Apps** field, enter *Absence Admin*.
4. Add the Absence Admin app.
5. Click **Back to Menu**.

Concept: Time Off Results by Period Reporting

Workday provides these standard reports, enabling you to view details of workers' time offs, such as accruals, time offs taken, time off balances, paid and unpaid time off for each period, and time offs to pay out when a worker is terminated:

Report	Considerations
My Time Off Results by Period	Workers can monitor and view details of their time offs for the time off plans that they're eligible for in the period. This report displays a subset of the columns in the standard **Time Off Results by Period** report.
Time Off Results by Period for Workers	Managers and administrators can use this report to view details of workers' time offs for the time off plans that workers are eligible for in 1 or more periods. When managers and administrators access the report, they can select an organization, 1 or more workers, or both. Note: If you leave the **Organization** and **Workers** fields empty, the report won't display any results. This report displays a subset of the columns in the standard **Time Off Results by Period** report.

Report	Considerations
Time Off Results by Period	Workers, managers, and administrators can access this report to view time off details in a balance period.

You can copy the **My Time Off Results by Period** and **Time Off Results by Period for Workers** reports to create custom versions of those reports. You can also create new custom reports by using the:

- Report fields on the Worker Time Off Results by Period business object.
- **Time Off Results by Period** data source.
- **Time Off Results by Period for Workers** data source.

When you create the custom report, consider that:

- The number of report fields that you add to the report can impact the report performance.
- You can hide the Workday-delivered reports by accessing the **Hide Workday Delivered Report** task.

Report Output

The report output of the **Time Off Results by Period for Workers** and **My Time Off Results by Period** reports displays a maximum of 10,000 rows, first sorted alphabetically by worker, then by time off plan, followed by ascending order of period. The maximum output also applies when you schedule the reports, and when you create new custom reports using either the **Time Off Results by Period** or **Time Off Results by Period for Workers** report data sources.

When the report output returns more than 10,000 rows, Workday recommends that you run multiple reports, using the prompts to filter the output to return less than 10,000 results each, instead of running 1 large report.

For optimal performance when you access the reports, Workday recommends:

- Storing time off balances up to 13 months back, using the **Schedule Time Off Calculated Balance Process** task.
- Building your period schedules no more than 2 years in the future from the current period.

Related Information
Concepts

Concept: Custom Reports

Tasks

Create Custom Reports

Reference

2025R1 Feature Release Note: Customizable Time Off Results by Period Reports

Reference: Absence Administrator Home Worklet

The Absence Administrator Home worklet provides easy access to frequently used Absence reports and resources.

Card	Tasks, Reports, and Resources
Time Off Plan Core	• **Time Off Plan Summary** • **Period Schedule Summary for Absence** • **Absence Eligibility Calculation Administrator View**
Time Off Setup Components	• **Accrual Summary** • **Time Off Summary**

Card	Tasks, Reports, and Resources
Leave of Absence Core	• **Leave Type Summary** • **Leave Rules Summary**
Schedules and Calendars	• **List Holiday and Work Schedule Calendar Rules** • **List Work Schedule Calendars** • **List Holiday Calendars**
Analysis	• **Evaluate Absence Eligibility** • **Evaluate Absence Calculation**
Resources	• Absence section of the Administrator Guide • Community Absence page • Absence roadmap

Reference: Time Off Reports

Standard Time Off Reports

To view the list of Workday-provided reports and their descriptions, access the **Workday Standard Reports** report, and select Time Off and Leave.

Reports Available as Related Actions

In addition to the standard reports, you can access several time off reports from the related actions menu of a worker. Select **Time and Absence** and the report name.

- **View Calculated and Override Balances**
- **View Carryover Balances**
- **View Time Off**
- **View Time Off Balance**
- **View Time Off Results by Period**

The **View Time Off Balance** report that is available as a related action on the worker profile automatically shows the data as of today’s date. Therefore if you run the report for today's date, the report doesn't account for future-dated Time Off Paid Year to Date. To account for future-dated time off, workers must enter a future date.

Report Availability and Balance Tracking

These reports are available only for time off plans that track balances:

- **Carryover Balance for Organization (by Carryover Date)**
- **Carryover Balances for Organization (by Worker)**
- **My Time Off Balances Details**
- **My Time Off Results by Period**
- **Time Off Results Detail**
- **Time Off Results by Period for Workers**
- **Time Off Results Summary**
- **View Calculated and Override Balances**
- **View Carryover Balances**
- **View Override Balances for Organization**
- **View Schedules for Time Off Calculated Balance Process**

- **View Time Off Balance**
- **View Time Off Results by Period**
- **Worker Time Off Balances Details**

Use the **View Time Off Balance** report to review information you enabled for the balance plan visibility type. Examples:

- Past, current, or projected time off balances.
- Carryover amounts.
- Year-to-date accruals.
- Paid time off year to date.
- Time off plan balances (carryover plus year-to-date accruals minus time off taken).
- Balances that include pending events.

In time off plans, accruals can occur at the beginning or at the end of the period. The **View Time Off Balance** report might not record all accruals for an absence period. Depending on the **As Of Date**, the accrual might not be visible until the end of the period. The report displays values based on the **Balance As Of Date** that you enter.

Time Off and Leave Calendar

Managers can use the **Time Off and Leave Calendar** report to view submitted and approved requests for their direct reports 1 week at a time. If a worker has multiple positions, the manager sees requests for all positions.

To add a link to the calendar from the **Team Time Off** worklet, use the **Configure Worklet** task.

You can control whether the calendar displays time offs, leaves, or both by configuring these domains:

- *Worker Data: Time Off (Time Off Manager View)*
- *Worker Data: Leave of Absence (Leave of Absence Manager View)*

Related Information
Reference
The Next Level: Reporting Foundation - Absence Management

Troubleshooting Time Off

Troubleshooting: Time Off

This topic provides strategies for diagnosing and resolving these time off issues:

- Workers can't request a particular type of time off.
- Workers hired midperiod don't accrue time off.
- Workers terminated midperiod don't accrue time off.
- Workers hired and terminated midperiod within the same period don't accrue time off.
- Workday doesn't create a termination adjustment for workers terminated midperiod.
- Rehired workers or workers with multiple termination dates lose their previously accrued time off. on page 2338
- Workers with service date changes lose their previously accrued time off. on page 2339
- Workers receive an error stating that they can't submit multiple time off requests for the same date.
- Users experience slow responses when requesting time off and running time off reports.
- Workers due to terminate in the current or a future period can't view their time off plan balance. on page 2341
- Worker data includes invalid absence records. on page 2341
- Absence table tier results in unpaid time off when a lower-priority absence tier has sufficient balance. on page 2341
- Inconsistent results showing for workers on the Time Off Results by Period report on page 2341

Workers can't request a particular type of time off.

Cause: The eligibility rules are incorrect for the time off plan or the time off. Eligibility rules on the time off override eligibility rules on the plan.

Solution:

Steps

Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area.

1. Access the **Edit Time Off Plan** task.
2. On the **Eligibility** tab, create or edit rules to be based on the period end date and period start date to cover workers hired and terminated.

Cause: The period schedule doesn't include the period for which the worker is requesting time off.

Solution:

Steps

Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area.

1. Access the **View Period Schedule** report.
2. Select **Period Schedule** > **Edit** from the related actions menu of the schedule and add the missing period.

Cause: The worker hasn't met the waiting period requirements.

Solution:

Steps

Security: *Set Up: Time Off* domain in the Time Off and Leave functional area.

1. Access the **Edit Time Off** task.
2. Configure an override on the **Time Off Plan Overrides** tab for a waiting period.

Workers hired midperiod don't accrue time off.

Cause: The eligibility rules for the time off plan include a period start date that's before the worker's hire date.

Solution:

Steps

Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area.

1. Access the **Edit Time Off Plan** task.
2. On the **Eligibility** tab, create or edit rules to be based on the period end date to cover the new hires.

Workers terminated midperiod don't accrue time off.

Cause: The eligibility rules for the time off plan include a period end date, when terminated workers aren't eligible for the plan.

Solution:

Steps

Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area.

1. Access the **Edit Time Off Plan** task.
2. On the **Eligibility** tab, create or edit rules to be based on the period start date to cover workers terminated midperiod.

Workers hired and terminated midperiod within the same period don't accrue time off.

Cause: Most absence calculations in Workday evaluate the time off eligibility rules as of either the:

- **Period Start Date**
- **Period End Date**

When workers are hired and terminated between those dates in the same period, they won't pass eligibility.

Solution: Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area.

Steps

1. Access the **Edit Time Off Plan** task.
2. On the **Eligibility** tab, create or edit rules based on the worker being in the selection list to remove the need to evaluate as of the period start and end dates.

Workday doesn't create a termination adjustment for workers terminated midperiod.

Cause: Eligibility rules for the time off plan are based on period end date so the worker is no longer eligible for the plan.

Solution:

Steps

Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area.

1. Access the **Edit Time Off Plan** task.
2. On the **Eligibility** tab, create or edit rules to be based on the period start date to cover workers terminated midperiod.

Rehired workers or workers with multiple termination dates lose their previously accrued time off.

Cause	Solution
You based a workers' accrual eligibility on their hire dates, which change when you rehire them.	Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area. 1. Access the **View Accrual** report and select the accrual. 2. From the related actions menu of the accrual, select **Accrual** > **Edit**. 3. On the **Time Off Plan Overrides** tab, update the worker eligibility rule to use a different calculation. Examples: • *Recent Hire Date as of Period End Date* • *Recent Hire Date as of Period Start Date*
You based time off plan eligibility on workers' termination dates but the worker was terminated multiple times.	Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area.

Cause	Solution
	1. Access the **Edit Time Off Plan** task and select the time off plan. 2. On the **Eligibility** tab, update the eligibility rule to use a different calculation. Examples: • *Recent Termination Date based on Period End Date* • *Recent Termination Date based on Period Start Date*

Workers with service date changes lose their previously accrued time off.

Cause	Solution
You based an accrual calculation on workers' continuous service dates, which change when you rehire them.	Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area. 1. Access the **View Accrual** report and select the accrual. 2. From the related actions menu of the accrual, select **Accrual** > **Edit**. 3. On the **Calculation** tab, drill into the calculation. 4. Update the calculation to use a different calculation. Examples: • *Recent Continuous Service Date Based on Period End Date* • *Recent Continuous Service Date based on Period Start Date*
You based an accrual scheduling rule on their seniority service dates, which change when you rehire them.	Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area. 1. Access the **View Accrual** report and select the accrual. 2. From the related actions menu of the accrual, select **Accrual** > **Edit**. 3. On the **Calculation** tab, drill into the scheduling rule in the **Scheduling** column. 4. Update the calculations in the scheduling rule to use a different calculation. Examples: • *Recent Seniority Date Based on Period End Date* • *Recent Seniority Date Based on Period Start Date*
You based an accrual calculation on their union seniority dates, which change when you rehire them.	Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area. 1. Access the **View Accrual** report and select the accrual.

Cause	Solution
	2. From the related actions menu of the accrual, select **Accrual** > **Edit**. **3.** On the **Calculation** tab, drill into the calculation. **4.** Update the calculation to use a different calculation. Examples: • *Recent Union Seniority Date Based on Period End Date* • *Recent Union Seniority Date Based on Period Start Date*
You based time off plan eligibility on workers' time off service dates.	Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area. **1.** Access the **Edit Time Off Plan** task and select the time off plan. **2.** On the **Eligibility** tab, update the eligibility rule to use a different calculation. Examples: • *Recent Time Off Service Date Based on Period End Date* • *Recent Time Off Service Date Based on Period Start Date*

Workers receive an error stating that they can't submit multiple time off requests for the same date.

Cause: The same recurring event occurs in more than 1 holiday calendar for the worker.

Solution: The worker has more than 1 holiday calendar. Set up the holiday as a recurring event on 1 calendar and as a one-time event on another.

Example: You set up New Year's Day as a recurring event on the 2011 calendar and a one-time event on a 2012 calendar. As a result, the worker receives the sum of the time off from the 2 events.

Steps

Security: *Set Up: Calendar* domain in the System functional area.

1. Access the **View Holiday Calendar** report.
2. Find the holiday in the **Calendar Event** column and review the **Recurring Event** column.
3. Delete the one-time event by selecting **Calendar Event** > **Delete** from the related actions menu of the holiday name.

Cause: The worker has 1 holiday calendar with the same holiday listed twice.

Solution:

Steps

Security: *Set Up: Calendar* domain in the System functional area.

1. Access the **View Holiday Calendar** report.
2. Select **Calendar Event** > **Delete** from the related actions menu of the holiday name to delete 1 of the holiday events.

Users experience slow responses when requesting time off and running time off reports.

Cause: You're not storing calculated time off balances on a regular basis.

Solution:

Steps

Security: *Process: Calculated Balances (Run)* domain in the Time Off and Leave functional area.

1. Access the **Schedule Time Off Calculated Balance Process** task.
2. Run or schedule the process that calculates and stores balances for time off plans.

Workers due to terminate in the current or a future period can't view their time off plan balance.

Cause: Workers don't meet the visibility conditions for the time off plan.

Solution:

Steps

Security: These domains in the Time Off and Leave functional area:

- *Set Up: Time Off*
- *Set Up: Time Off (Calculations - Absence Specific)*

1. Access the **Edit Time Off Plan** task.
2. Change the **Balance Visibility Type** for the plan.

Worker data includes invalid absence records.

Cause: This problem might occur when there are unsubmitted time off corrections for workers.

Solution:

Steps

Security: *Set Up: Time Off* domain in the Time Off and Leave functional area.

1. Access the **Cleanup Invalid Absence Data** task.
2. Update or remove invalid absence data.

   Example: You can delete unsubmitted time off corrections.

Absence table tier results in unpaid time off when a lower-priority absence tier has sufficient balance.

Cause: Workday doesn't automatically reevaluate absence table tiers in response to changes in eligibility rules, or adjustments and overrides on accrual and time off balances.

Solution:

Steps

Security: *Set Up: Time Off* domain in the Time Off and Leave functional area.

1. Access the **Reevaluate Absence Table Time Off Entries** task.
2. Select 1 or more workers or organizations and the absence table that you want to reevaluate. You can also select an as-of date from which to reevalulate time off entries.

   Note: You can only reevaluate and correct approved time off for specific workers if:

   - You've permission to correct their time off, based on the *Correct Time Off* business process security policy.
   - You're a member of a role-based security group with contextual access for the worker.

Inconsistent results showing for workers on the Time Off Results by Period report

Cause: Workers aren't eligible for time off plans as of today. When you access the **Time Off Results by Period** report, you might find that:

- You can only select 1 time off plan from the **Time Off Plans** prompt for a future date even when workers are eligible for multiple plans on future dates. Example: On 2022-01-01, a worker isn't eligible for *Time Off Plan A* and *Time Off Plan B* until 2025-01-01. However, Workday only displays *Time Off Plan A* in the **Time Off Plans** prompt.
- Workday displays an error message indicating that the request timed out. Searching for a time off plan or period took too long and you need to refine your search.

Solution: Workday calculates time off balances dynamically. Period schedules for more than 2 years in the future can cause performance issues. Workday doesn't support future-dated eligibility more than 2 years in the future on the **Time Off Results by Period** report. This limitation is due to the number of calculations that Workday needs to resolve to view balances more than 2 years in advance.

For optimal performance, Workday recommends that you build period schedules no more than 2 years in the future from the current period.

Steps

Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area.

1. Access the **Create Period Schedule** task.
2. Select the period **Frequency**.
3. Select a **Usage** of *Absence*.
4. Enter the **Period Start Date** and the **Period End Date** for each period.
5. Add periods for the current and next year.
6. Assign the period schedule to 1 or more time off plans.

Related Information
Concepts

Concept: Eligibility for Time Off Plans, Time Off, and Accruals on page 2142

Concept: Guidelines for Storing Time Off Balances on page 2319

Tasks

Create Period Schedules for Time Off on page 2160

Create Time Off Plans That Track Balances on page 2126

Create Accruals on page 2162

Steps: Create a Time Off on page 2104

Create Time Off Plan Overrides for Time Offs on page 2295

Examples

Example: Define Eligibility for a Time Off Plan on page 2192

Example: Create a 90-Day Waiting Period for Accruals on page 2204

Example: Configure Accruals Relative to Hire Date and Years of Service on page 2206

Leave of Absence

Set Up Leave of Absence

Setup Considerations: Leave of Absence

You can use this topic to help make decisions when planning your configuration and use of leave of absence functionality. It explains:

- Why to set it up.
- How it fits into the rest of Workday.

- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Workday leave of absence functionality enables:

- Workers to record when they're taking leave from work with an estimated or flexible end date.
- Administrators to manage the impacts a leave of absence can have on other areas of Workday and other systems. Example: Headcount Reporting or Payroll.

Business Benefits

You can use Workday leave of absence functionality to:

- Track costs as you can use reports to view how much absenteeism is costing your organization and calculate your absence liability.
- Minimize risks as you ensure that your leave policies are consistent with country-specific requirements.
- Improve efficiency in your organization as managers can use reports, predict trends, and plan resources accordingly.
- Integrate with a Payroll solution to enable you to process payments to workers on leave.
- Streamline the process of moving workers from one leave type to another. Example: Paid to unpaid maternity leave.
- Create a variety of leave types and families that can suit the specific requirements of your organization. This functionality improves the user experience as they can quickly find the correct leave type for their request.

Use Cases

- Enable workers to view and request some types of leave, but not others.
- Place workers on, and return them from, a leave of absence.
- Request documentation, other required information, or both from workers when they enter leave requests.
- Import large volumes of leave of absence events into Workday.

Questions to Consider

When deciding if you should create a time off or leave of absence, consider:

Question	Consideration
When do you expect your workers to return to work?	You can create: • A time off for absences that have a short duration with a known return to work date. Workday creates a time off request for each day a worker expects to be off work. Example: Use annual leave for a vacation with a planned return date. • A leave of absence for longer durations, or for time away from work with an estimated end date. Example: Use parental leave for new parents.
How do you want your workers status to display?	You can create:

Question	**Consideration**
	• A time off if you want your workers' status to remain unchanged. • A leave of absence if you want your worker's status to display as *On Leave*. You can configure if this status displays on each leave type. Example: You can configure Workday to hide workers on leave from search.
How do you want to restrict a worker's absence balance?	You can create: • A time off if you want your worker to accrue their balance over time. Example: Paid sick leave can accrue over a period to enable workers to take up to 10 days per year. • A leave of absence if no accrual is necessary. Leave Types have an entitlement that each eligible worker can use. Example: You grant parental leave based on your worker's eligibility and company requirements.
How do you want your workers to return to work?	You can create: • A time off if you want a worker to return to work without their manager approving it. • A leave of absence if managers must ensure that a worker's leave of absence ends before they can return to work. A worker's status displays as *On Leave* until their manager returns them to work.
What periods do you use when tracking absences?	You can create: • A time off if you want your workers to accrue their balance within a specified period. The period schedule used for Time Off aligns with the schedule you use for Payroll. • A leave of absence if the balance period is rolling backwards or forwards from the effective date of the leave, or first date of the leave.

When setting up leaves of absence, consider:

Question	**Consideration**
What details do you want your workers to enter when requesting a leave of absence?	When setting up leave of absence types, you can: • Create rules to display what data is necessary for each leave type request. Managers can use this information to ensure that their workers complete their requests correctly. • Include forms that your organization requires to secure reimbursement from the government. Example: Workday sends government forms to a worker who enters a parental leave request. • Configure reasons for workers to select when they're entering an absence request. You can

Question	Consideration
	view the reason usage count in your reports to predict trends and plan resources. • Create additional fields that a worker completes when entering a leave of absence request. Example: Child's Birth Date. You can configure your leave type to make these fields obligatory. You can also hide these fields from a worker. When a reviewer checks the request, Workday displays the hidden fields. If the hidden field requires a value, the reviewer enters the value.
How do you want to pay your workers when they are on leave?	You can: • Configure cascading leaves of absence that have different rates of pay over the duration of the leaves. • Select which leaves of absence have a payroll effect. Your payroll administrator can configure rules for how you pay your worker who is on leave. You can create separate leave types when a worker changes from 1 payment rate to a different rate. You can also create cascading leaves to move a worker from 1 leave to the other when their balance expires.
Which leave types do you want to make available to your workers?	You can create eligibility rules to restrict access to leave types. You can also add leave types to security segments to ensure that workers can only view leave types for which they’re eligible. Example: Restrict eligibility to full-time workers, or require that workers work at least 250 hours in the last 12 months.
How do you want to display leave types?	You can group leave types together in leave families. Workers can select from relevant leave types in these categories when entering a leave request. This functionality improves the user experience as they can quickly find the correct leave type for their request. Workday delivers country-specific leave families and their respective leave types. Example: Create 1 leave family called *Company Leave* for disability and bereavement leave, and another called *Family Leave* for maternity and parental care leaves. You can also group leave types for a specific country or region together in a leave family.
How do you want to inform your workers about their request status?	When you set up leaves of absence, workers can use self-service tasks to view the status of their requests. You can also create validation messages to alert workers as they enter their request. Example: You can display an alert when workers enter leave requests that exceed their leave balance.

Question	Consideration
Which nonwork days do you want to include in your leave balances?	You can configure which days to include in your workers leave balances. Example: A worker requests study leave over months in which there are national holidays. You can configure your leave type to include, or exclude, holidays when deducting the leave balance.
How do your workers return to work after a leave of absence?	You can configure Workday to alert your managers when their workers are returning from leave. Workers can send their own return from leave requests using the employee self-service tasks. Workday also increases efficiency by enabling you to return a group of workers from leave.
How do you identify which workers are on leave?	You can display *(On Leave)* after the worker's name. If your worker has more than 1 position and is taking leave from one, you can configure the notation to display beside that position. Example: A worker holds 3 positions: Professor, researcher, and physician. All of the leave types they're eligible for are set to display the *(On Leave)* status if: • They take a worker-based leave of absence *(On Leave)* displays after their name and 3 positions. • They take a position-based leave from their professor position only *(On Leave)* displays after the professor position only.
How do you want to view the number of days a worker takes on leave?	You can create a report that displays all approved leaves for a worker. You can configure this report to display the number of days the worker is absent in a specific time frame. Example: Create a report to display the total number of sick days a worker takes over 6 months.
How do you want to correct approved leave of absence requests?	You can configure your business processes to enable managers to correct an approved leave of, or return from, absence request. Corrections trigger a notification to the Payroll Interface Partner of the worker's organization if the leave type has a payroll effect.
How do you want to create country-specific leave types?	You can use the **Global Library** report to view high-level descriptions of sample leave types.
How do you want to process entitlements during a leave of absence?	You can calculate entitlements from a leave family or a specific leave type. If the leave type is linked to other leave types or time offs, you can display the combined entitlement balance for the related leaves and time offs.
If you allow workers to go on partial leave of absence, how do you want them to request the leave?	You can configure leave types that: • Enable workers to enter a leave percentage when requesting leave.

Question	Consideration
	• Prorate leave units taken for workers when they request leave of absence, based on the leave percentage that they enter on the request.
How do you want your workers to accrue time off while on leave?	You can suspend a worker's accrual when they are on leave. Alternatively you can prorate the accrual for the period in which the worker is on leave.

Recommendations

Note:

In September 2025, we plan to retire these legacy reports and tasks:

- **Absence Calendar**
- **Place Worker on Leave**
- **Request Leave of Absence**
- **Time Off and Leave Calendar**
- **Time Off Calendar**

To aid in your transition to Absence Calendar Experience on desktop and mobile, Workday recommends that you familiarize yourself and groups of users by configuring the initiating actions for the experience instead. See Steps: Set Up the Absence Calendar Experience on page 2072.

Workday recommends that you:

- Avoid configuring your accrual for a balance period when a worker is on leave, when you create a time off.
- Create validations for leave types that track balances. These validations alert workers that they might not have the balance to complete their leave of absence request.
- Use leave reasons and additional data functionality to provide necessary leave data to assist administration.

Requirements

Ensure that leave periods don't overlap for cascading leaves.

Limitations

- Cascading leaves end one leave before starting the next one. It isn’t a continuous leave. This can cause issues when generating reports as it can display that the worker has taken more than 1 leave. Consider returning a worker from their existing leave, so that the subsequent cascaded leave is the only 1 present.
- Workers must enter at least 1 day for a leave of absence request.
- For privacy, you can't directly reference report fields related to the Leave Request Event business object in Workday Payroll calculations, such as the leave reason.
- Workday Payroll doesn't support retro-pay calculation for multiple returns from leave in a single event. To return workers or correct returns from multiple leave request events, select only 1 leave request event at a time. Workday creates a separate leave return event for each leave request event. See:
  - Correct Return from Leave of Absence Requests
  - Return Workers from Leave
- Workday Payroll for Canada doesn't support the ROE feature with cascading leaves of absence.
- Workday Payroll for the UK doesn't support cascading leave types linked to statutory payments.
- The maximum duration that you can set for a leave type is 50 years.

- Leave types don’t support entitlements with an accrual. Set entitlements at the beginning of the leave event to deduct during the balance period of the leave type.
- Use the same unit of time for any intermittent time off associated with a corresponding leave type.
- Workday doesn't generate absence calculations with leave types that correspond with payroll calculations.
- Workers remain *On Leave* after termination, unless returned from leave during the termination process.

Tenant Setup

Select **Allow Job Overlap for Leave** to overlap workers in the same position when the incumbent starts a leave of absence. This setting automatically applies to any position filled by a worker who goes on leave.

Security

- Users with access to *Set Up: Leave of Absence* domain in the Time Off and Leave functional area can create types of leave. They can also control access to the leave types by creating rules.
- You can create eligibility rules to restrict access to leave types. You can also add leave types to security segments to ensure that eligible workers can view leave types.
- Configure the *Request Leave of Absence* business process to enable users to place other workers on leave or correct leave requests.
- Users with access to an initiating security group for the *Request Return from Leave of Absence* business process can return workers from a leave of absence.

Business Processes

Business Process	Considerations
Absence Calendar (Legacy)	The *Enter Absence* initiating action on the legacy *Absence Calendar* business process security policy enables secured workers to use their absence calendar to place other workers on leave.
Request Leave Of Absence	You can add steps to this business process to: • Request supporting documentation when a worker is entering a request. • Configure who can approve leave requests and correct leave end dates if they change. • Enable users to request a change to a worker's compensation, benefits, or both, when they take a leave of absence or return from leave. • Enable users to bulk load leave of absence events.
Request Return from Leave of Absence	You can add steps to this business process to: • Enable workers to request a return from a leave of absence on behalf of someone. • Enable users to update service dates manually, such as the continuous service date. • Enable users to request a change to the compensation and/ or benefits of a worker when the worker takes a leave of absence or returns from leave. • Enable users to bulk load request return from leave of absence events.

Business Process	Considerations
Termination	Add automated leave processing after the completion step to enable you to terminate workers while they're on leave.

Reporting

Reports or Dashboards	Considerations
All Leave Families	Use this report to view all the leave families that you can use to group leave types so that workers can select them when requesting leave of absence.
All Leave Type Security Segments **View Leave Type Security Segment**	Use these reports to view the leave types to which workers have access.
Enter Absence	Use this report to view the leave types that the worker is eligible for on the first day of the leave request.
Leave Results for Worker (includes leave balance) **Leave Results for Organization** (includes leave balances) **Maintain Worker Documents**	Use these reports to predict trends and plan for costs of workers being on a leave of absence.
Team Absence Calendar	Use this report to analyze absence requests so that you can better manage team resources.
View Leave Family	Use this report to view a specific leave of absence family. Details include: • Each leave type that is part of the leave family. • If the leave family is active. • Its availability to workers in each location. • Effects on payroll processing. • Usage count.
View Leave of Absence Rule	View the condition rules that make up a specific leave of absence rule.
View Leave Type	Use this report to view the eligibility criteria and leave impacts for a specific leave type.
View Worker Leave of Absence Eligibility by Organization	Use this report to view leave of absence eligibility details for active workers within the selected organizations, as of the current day.
Workers on Leave	You can identify workers on leave and check that any existing ongoing payments they have are still applicable during the leave.
Workers Returned from Leave **Workers Returning from Leave**	You can identify workers that returned or are returning from leave and check that you've correctly configured payroll for them.

Integrations

Web Services	**Consideration**
Get Leave Families *Put Leave Family*	Use these web services to view existing, or upload your own leave families.
Get Leave Type Reasons *Put Leave Type Reason*	Use these web services to view existing, or upload your own reasons for a leave of absence.
Get Leave Types *Put Leave Type*	Use these web services to view existing, or upload your own leave types.
Import Request Leave of Absence Events	Use this web service to: • Load large volumes of request leave of absence events in batches. • Correct multiple request leave of absence events for workers. • Optionally, add a comment for each request leave of absence event.
Import Request Return from Leave of Absence Events	Use this web service to: • Load large volumes of request return from leave of absence events in batches. • Correct multiple request return from leave of absence events for workers. • Add a comment for each request return from leave of absence event.
Request Leave of Absence	Use to enter new, or correct existing, leave of absence requests.
Request Return from Leave of Absence	Use this web service to request a worker's return to work from a leave of absence.

Connections and Touchpoints

Touchpoint	**Consideration**
Benefits	Workday Benefits can reference leaves of absences to change the employee's benefit elections, report a life event, and update the benefit elections accordingly.
Payroll	When a worker is on a leave with payroll effect enabled, Workday processes them as on leave. Workday processes workers with other leave types as active. You can define different payroll processing rules for workers who are on leave. Workday Payroll also provides several features that enable you to meet regulatory reporting requirements for workers on leave.

Touchpoint	Consideration
Talent	Workday Talent removes workers from the type of leave from the employee reviews and feedback processes.
Time Off	Workday can suspend accruals when a worker is on a leave of absence.
Time Tracking	Workers can enter and submit time through Workday Time Tracking while they're on leave. You can also create a time validation to prevent submission.

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information

Concepts

Concept: Leave of Absence Business Processes on page 2368

Setup Considerations: Pay for Workers on Leave

Tasks

Create Leave Types on page 2356

Reference

Reference: Leave Impacts on page 2373

The Next Level: Overview of Absence Management, Including Employee and Manager Self Service

The Next Level: Absence Configuration

The Next Level: PATT Touchpoints with Assignments

Preconfigured Content: HCM Delivered Configurations

Examples

Example: Set Up Parental Leave on page 2390

Steps: Set Up Leave of Absence

Prerequisites

To create position-based leave types, enable multiple jobs functionality in your Workday tenant.

Review setup considerations for leaves of absence.

Context

When you set up leaves of absence, workers can use self-service pages to enter leave of absence requests and view the status of their requests. Managers and administrators can place workers on leave, return workers from leave, and track leave.

Steps

1. Edit Business Processes.

   To send leave requests for review and approval, configure these business processes:

   - *Request Leave of Absence*
   - *Request Return from Leave of Absence*

2. Access the **Maintain Leave Families** task.

   To set up leave type categories that you can select when entering a leave request and use for tracking, create leave of absence families.

   Example: Create a leave family named:

   - Company Leave for disability and bereavement leave.
   - Family Leave for maternity and parental care leaves.

   Security: *Set Up: Leave of Absence* domain in the Time Off and Leave functional area.
3. (Optional) Create Leave of Absence Rules on page 2354.
4. Create Leave Types on page 2356.
5. Configure the **Absence** dashboard to track absence reports, manager self-service tasks, and analytics.

   See Steps: Set Up Dashboards and Landing Pages.

Related Information

Concepts

Concept: Leave of Absence Business Processes on page 2368

Concept: Dashboards for Time Tracking and Absence on page 2675

Concept: Coordinated Leaves and Time Off on page 2367

Setup Considerations: Absence Calendar Experience on page 2067

Reference

The Next Level: Overview of Absence Management, Including Employee and Manager Self Service

The Next Level: Advanced Absence Concepts

The Next Level: PATT Touchpoints with Assignments

Steps: Set Up Segmented Security for Leave Types

Prerequisites

Create leave types.

Context

Restrict members of segment-based security groups to designated leave types so that they can only select specific leave types when:

- Requesting or entering leave of absence.
- Correcting leave events.
- Requesting or entering return from leave of absence.

Note: You can ensure that members of a security group can select all leave types, including types restricted to segment-based security groups. Secure the group directly to the *Access Leave Type (Segmented)* domain.

Steps

1. Access the **Domain Security Policies for Functional Area** report .

   Review the segment-based security groups on the *Access Leave Type (Segmented)* domain security policy. This domain enables you to configure access to security segments for leave types.

   If not already enabled, select **Domain Security Policy** > **Enable** from the related actions menu of the security policy for the *Access Leave Type (Segmented)* domain in the Time Off and Leave functional area.

   Security: The *Security Activation* and *Security Configuration* domains in the System functional area.

2. Access the **Create Leave Type Security Segment** task.

   Create a leave type security segment that defines the group of restricted leave types.

   In the **Leave Types** prompt, select the leave types that comprise the segment.

   Security: *Set Up: Leave of Absence* domain in Time Off and Leave functional area.
3. Create Segment-Based Security Groups.

   Create a segment-based security group and associate it to the leave type segment.

   a) In the **Security Groups** prompt, select the groups that have access to the leave types.
   b) In the **Access to Segments** prompt, select the leave type security segments to which members of the specified groups have access.
4. Edit Domain Security Policies.

   a) Add the segment-based security groups to the *Access Leave Type (Segmented)* domain in the Time Off and Leave functional area.
   b) If necessary, remove the security groups from the domain security policy that are also in the segment-based security group.

      If you don't remove the security groups:

      - The domain-level permissions override the segment-based permissions.
      - Members of security groups secured directly to the domain can access all leave types.

      If the *Access Leave Type (Segmented)* domain security policy includes security groups that aren't associated with a leave type segment, Workday doesn't apply any security segment restrictions to users in the security group, even if they're also in a security group that's associated with another leave type segment. Example: Your company has 4 leave types: *Adoption*, *Parental*, *Maternity*, and *Sabbatical*. You configure these segment-based security groups and add them to the domain.

Segment-Based Security Group	Access Leave Type (Segmented) Domain Access	Associated with a Segment	Leave Type	Considerations
Group A - Administrators	Yes	No	N/A	Users can access all leave types when correcting leave events, requesting leave of absence, or requesting return from leave of absence. This overrides the *Group B - Employee as Self* security configuration.
Group B - Employee as Self	Yes	Yes	*Adoption*, *Parental*, and *Maternity*.	Users can access only the *Adoption*, *Parental*, and *Maternity* leave types. They can't access the *Sabbatical* leave type.

5. Activate Pending Authentication Policy Changes.

Result

When members of the segment-based security groups enter or request leaves of absence, they can only select the leave types that comprise the leave type security segment. The members can also correct only requests with the leave types to which they have security access.

The **All Leave Type Security Segments** report enables you to see the leave types to which segment-based security groups have access.

Related Information
Reference

The Next Level: Using Absence to Record Furloughed Leave

Create Leave of Absence Rules

Prerequisites

Security: *Set Up: Leave of Absence* domain in Time Off and Leave functional area.

Context

You can create leave of absence rules to define:

- Worker eligibility for leave types.
- Validations that prevent the submission of invalid leave requests.

When you don't configure leave of absence rules, you can only limit eligibility for a leave type to workers in selected countries or regions.

Eligibility rules apply when entering leave requests. The **Leave Type** prompt displays only those leave types that the worker is eligible for on the start date of the request. Example: Restrict eligibility to full-time workers, or require that workers work at least 1,250 hours in the last 12 months.

Validation rules apply when submitting leave requests. Workday applies the rule to each day of the requested leave. Example: The length of a worker's requested leave can't exceed the maximum number of days allowed each year. If the validation fails, Workday issues a warning or error and sets requests that are in error to a *Save for Later* status.

Use report fields or create calculated fields to build rules. You can associate the same leave of absence rule with multiple leave types.

Steps

1. Access the **Create Leave of Absence Rule** task.
2. Enter the **Description**, which Workday displays in the validation warning or error message.
3. As you complete the task, consider:

Field	Description
Source External Field or Condition Rule	Select a report field or calculated field. Fields available are based on these business objects: • *Worker* • *Leave Request Event* • *Leave Type* • *Position* For eligibility rules, select fields based on the *Worker* or *Position* business object only, as

Field	Description
	Workday applies these rules before the leave type or event information is known. Pay attention to names and descriptions when selecting values. Example: *Worker, Job*, *Primary Job*, and *Across Jobs* indicate whether a field resolves for a worker, a worker's primary job, or all jobs. In general, when a field related to a position is called from a worker-based leave type, it resolves based on the primary position. If called from a position-based leave type, it resolves based on the applicable position.
Relational Operator	The type of report field or calculated field determines available options.
Comparison Type	Specify whether to compare the source to another field or to a value you enter.
Comparison Value	Select a comparison field or enter the value to compare to the source.
Order	Use this column to control the processing order for the statements.

4. When 2 or more rows exist, set the *And* or *Or* option at the beginning of each statement to control how the statement is used with the line above.

   All conditions in an expression connected by *And* must be true for the expression to be true. Any of the conditions in an expression connected by *Or* can be true for the expression to be true.
5. Use the parentheses columns when you've 3 or more rows and a combination of Ands and Ors.

   Example: To have (a and b) or c, use:

   - The opening parenthesis at the beginning of statement a.
   - *And* before statement b
   - The closing parenthesis at the end of statement b.
   - *Or* at the beginning of statement c.
6. Click **OK.**
7. (Optional) Define a message to display in place of the rule description when the rule is used to validate leave requests:

   a. From the related actions menu of the rule select **Validation** > **Configure Validation Message**.
   b. Specify if the message begins with **Text** or a value from an **External Field**.
   c. Add rows to enter additional information for the message.

      Workday displays the concatenated text in validation error or warning messages.

Example

When workers enter leave requests that exceed their leave balance, you want to display this message:

The leave balance for <leave type> is exceeded with this leave request. The leave balance prior to this request was <# of units>.

To configure the message, enter this message in the **Validation Message** section of the **Configure Validation Message** page:

Text/External Field (Radio Button)	Entry
Text	*The leave balance for*
External Field	*Leave Type* (report field based on Leave Request Event)
Text	*is exceeded with this leave request.*
Text	*The leave balance prior to this request was*
External Field	*Outstanding Leave Balance for Leave Type this Balance Year (Prior to Current Leave)* (report field based on Coordinated Leave/Time Off)
External Field	*Unit of Time for Leave Tracking* (report field based on Leave Request Event)
Text	*.* (dot or period character)

Next Steps

After you define leave of absence rules, you can:

- Use the **Create Leave Type** or **Edit Leave Type** task to associate the rules with leave types, either as additional eligibility criteria or to perform data entry validation.
- Review the rules using the **View Leave of Absence Rule** report or the **All Condition Rules** report.

  When accessing the **All Condition Rules** report, select *Leave of Absence Rule* as a filter.

Related Information
Examples

Example: Create Leave of Absence Rules for Leave Type on page 2377
Example: Require Workers to Use Time Off Before FMLA on page 2378

Create Leave Types

Prerequisites

- Create leave of absence families.
- Create leave of absence rules if you want to define worker eligibility requirements or validations for leave requests.
- Security: *Set Up: Leave of Absence* domain in the Time Off and Leave functional area.

Context

A leave type defines the set of rules that apply to a specific type of leave, such as jury duty or Family or Medical Leave of Absence (FMLA). It identifies:

- The leave of absence family.
- The unit of time for leave requests.
- Worker eligibility, validation, and other rules.
- Whether to track balances.

If your Workday tenant is enabled for multiple jobs, the leave type also indicates whether the leave type is position-based.

You can link a leave type to other leave types and time offs so that Workday calculates combined balances for leave.

Steps

1. Access the **Create Leave Type** task.
2. As you complete the task, consider:

Field	Description
Leave Type	Enter a name that represents the reason for the leave.
Leave Type ID	Web service API and EIB uploads use the ID. If you leave this field empty, Workday automatically assigns a value.
Position Based	The check box displays if your Workday tenant is configured to support multiple jobs on the **Edit Tenant Setup - HCM** task (**Position Setup Options** field). Select to track leaves of absence for workers by position. You can't change this setting once leave requests or other leave data exists. When a leave type is position-based, you must provide the worker's position when entering a leave request. Balances are also position-based. Typically, eligibility rules, validations, supporting data, and entitlement calculations apply to the worker's position as well. However, when defining these rules you can instead use report fields or calculated fields that refer to the primary job or across all jobs. Leave the check box unselected to specify that the leave type and balances are worker-based. Eligibility rules, validations, supporting data, and entitlement calculations typically apply to the worker's primary position, unless you define these rules to look across all jobs.
Leave Family	Specify the leave types for workers to select while requesting a leave of absence.
Inactive	Makes the leave type unavailable for use. When selected, workers can't request or be placed on inactive leave types. Standard reports continue to track workers already on leave and display details for the leave type.
Leave Payment Type	(Optional) Link the leave type to a Workday-delivered earning for a statutory payment type so that Workday Payroll can process statutory payments based on the leave type. Examples: • Maternity leave payment type for Payroll for the UK. • Part-time therapeutic leaves or reclassification leaves for Payroll for France.

Field	Description
On Leave Status Visibility Type	While a worker is on leave, Workday displays the *(On Leave)* status next to the worker's name. Select whether the status displays: • Always. • Never. • Only to users who are authorized to view the worker's leave of absence.

3. Define **Eligibility Criteria** to control whether the leave type is available for selection when entering a leave request:

Field	Description
Country/Country Region	Restricts the availability of the leave type to selected locations. The worker's work address on the first day of the leave must be in one of the selected locations. If empty, the leave type is available in all locations.
Additional Criteria	Select leave of absence rules that define additional criteria workers must meet on the first day of the requested leave to be eligible for the leave. Workers must meet all additional criteria.
Enabled for Worker Type	Specify whether the leave type is available for employees, contingent workers, or all workers.

4. In the **Leave Impacts** section, specify how a leave affects areas outside of Workday Absence Management.

   Examples:

   - To stop paying workers who are on this leave, select **Payroll Effect**. If you're using Workday Payroll, you can continue to pay workers on leave according to run category criteria.
   - To adjust seniority calculation for Payroll for France, select **Continuous Service Accrual Effect**. You can later map the leave type to a parental leave or parental presence value on the **Maintain Absence Mapping for Payroll France** task. Workday deducts half of the number of days on leave, rounded down to the nearest day, from the adjusted seniority calculation.
5. On the **Validations / Supporting Data** tab, select the validation rules to apply to leave of absence requests:

Field	Description
Leave of Absence Rule	When a worker submits a request or saves the request for later, Workday: • Applies the rules to each day of the requested leave. • Issues a warning if a request is invalid. • Routes requests with warnings for review. Workday generates errors or warnings when leave of absence requests don't meet the validation conditions.

Field	Description
Do Not Allow Request	Select this check box to issue an error for invalid requests instead of a warning. Workday doesn't allow the request and requests with errors remain in a *Save for Later* status until deleted or corrected. Don't select this check box to issue a warning for invalid requests but allow the request.
Allow Override for Entry on Behalf of Worker	Enable workers placing a request on behalf of another worker to enter the request regardless of the error condition. In this case, both errors and warnings display as warnings.

6. Identify any **Supporting Data** to display to workers on the request confirmation page or when reviewing a request.

   Supporting data provides information relevant to the request that can help workers understand the reason for a warning or error. The information can also help reviewers determine reasons for approving or rejecting requests.

Field	Description
Value to Display	Identify the types of data to display, such as: • Months of service for the worker. • Actual hours worked. • Available leave balances as of the first day of the leave. Select from the report fields or calculated fields for the *Worker*, *Leave of Absence Type*, *Leave Request Event*, or *Position* business object. Workday retrieves supporting data based on the worker as of the first day of the leave. If the leave type is linked to other leave types or time offs, you can display the combined entitlement balance for the related leaves and time offs.
Label Override	Enter text to display instead of the name of the report field or calculated field you selected in the **Value to Display** field.
Hide from Worker Self Service	Prevent supporting information from displaying on self-service pages.

7. On the **Balance/Leave Taken** tab, configure balance tracking options.

   a) Provide information Workday needs to calculate balances for leave taken:

Field	Description
Track Balance	Select to track leave balances for workers. If balance tracking doesn't apply, complete only these fields on this tab: • **Unit of Time**

Field	Description
	• **Days to Include**
Balance Calendar Start Date **Balance Calendar End Date**	Select calculated fields that define the start and end dates for the balance calendar.
Unit of Time	Select *Days* or *Hours* as the unit of time for leave requests and entitlement balances.
Calendar Display	Select from these options to specify how to display leave entitlement balances on the calendar: • *Do Not Show Balance* • *Family and Type* • *Type*

b) Define **Leave Entitlement** options:

Field	Description
Entitlement per Event	Grant workers the full entitlement for every request for this leave type, regardless of the timing of the requests. When you select this option, you can link multiple requests for this leave type within the same balance calendar so that the requests draw from the same entitlement balance.
Entitlement Units	Select from these options to specify whether there's a maximum number of days or hours available to workers for this leave type: • *Numeric*: Enter a literal numeric value. • *Calculation*: Select a calculated field that's based on the *Worker* or *Position* object. • *None of the above*.

c) Identify **Days to Include**:

This field determines which days to count as taken within each leave request and, for leaves tracked in hours, determines the number of hours to count for each day taken based on the position or worker's scheduled weekly hours. This field doesn't apply to other leaves in the same family or to time offs identified in the **Intermittent Time Offs** field. The **Days to Include** value on the time off plan controls the intermittent time offs.

Select the **Configure Days to Include** option to display the **Include Holidays from Holiday Calendar** check box and **Included Days** field.

d) If applicable, identify coordinated leave types and time offs.

Workday reduces the balance for this leave type by units taken for the leave types and time offs you select.

If your Workday tenant is configured to support multiple jobs, these rules apply:

- If the leave type is position-based and a coordinated leave or time off is worker-based, units taken for worker-based absences reduce the leave balance for each of a worker's positions.
- If the leave type is worker-based and a coordinated leave or time off is position-based, units taken for each position reduce the worker's leave balance.

Field	Description
Include all Leave Types from Leave Family	Select to include units taken for all other leave types in the same family as units taken for this leave type. Families containing all leaves types with the same unit of time as the leave type you're defining are available for selection.
Additional Leave Types	Select other leave types that count as units taken for this leave type. Configure any leave types that you select in this field to reference the leave type you're defining.
Intermittent Time Offs	Select all time offs that count as units taken for this leave type. You can associate a time off with only 1 leave type. Eligibility and validation rules defined for the leave also apply to the time offs. Intermittent time offs subtract from the leave balance without having the employee on a leave through the *Request Leave of Absence* business process.

e) (Optional) Select the **Prorate by Leave Percentage** check box to enable proration of leave units on leave requests by the **Leave Percentage** additional field on the leave type. Workday reduces the balance entitlement by the prorated amount when workers take leave that's not full time.

Note: You need to configure Absence Calendar Experience if you enable proration.

8. (Optional) To have the end of a worker's leave trigger a request for another type of leave, select the **Next Leave Type** on the **Cascading Leave** tab.

Example: If you're defining a short-term leave type and you want it to cascade to a long-term leave type, select a long-term leave type. Example: Select **Disability > USA Long Term Disability**.

Your selection depends on whether this leave type is worker-based or position-based.

Workday generates a request to place the worker on the next leave type at the end of the current leave if the:

- *Request Leave of Absence* business process is configured for cascading leave.
- Employee meets the eligibility requirements for the next leave type.

Note: Workday Payroll for the UK doesn't support cascading leave types that are linked to statutory payments, except for Statutory Sick Pay.

9. (Optional) On the **Additional Fields** tab, configure:

Field	Description
Leave Reasons	Select **Leave Reason Required** if workers must select a reason when entering a request. The **Reason ID** is used in web service API and EIB uploads of leave requests. Workday updates the **Usage Count** each time a request includes the leave reason. When you make a reason **Inactive**, it's hidden on requests that are pending approval.
Additional Fields	Select additional fields to display on leave requests. You can add a **Leave Percentage** field to enable workers to enter a percentage of leave units on leave requests. Workday uses this value if you enable proration on the **Balance/Leave Taken** tab. You can enable workers to provide information required for the leave such as *Child's Birth Date* or *Expected Due Date*. Example: When workers request UK Statutory Maternity Leave, they must report the child's expected due date. You can also use the information captured in these fields to create leave of absence rules: • For validations and supporting data. • To determine eligibility or balances. Using report fields, you can also create condition rules within the *Request Leave of Absence* business process to route leave requests for approval based on the information provided in these fields. Select **Required** if the worker must enter a value when submitting a leave request. If you add a required field or change an empty optional field to required, while leave requests are in a *Save for Later* status or pending approval, you can't submit or approve the requests until you add the missing data. Select **Hide from Worker Self Service** to prevent workers from seeing the field when entering requests. When a reviewer checks the request, Workday displays the hidden fields. If the hidden field requires a value, the reviewer must enter the value. Additional fields display on leave requests in a predefined order. When you save the leave type, Workday displays the fields in the order that they occur in requests.

Field	Description
	Information entered in these fields cascades to the next leave, if: • This leave type belongs to a sequence of cascading leave types. • The next leave type has the same additional fields.

Next Steps

You can use:

- The **View Leave Type** report to review details for a selected leave type.
- These reports to see which leave types belong to each family and details for each leave type:
  - **View Leave Family**
  - **All Leave Families**
- The **Prorate by Leave Percentage** report field on the *Leave of Absence Event* business object in custom reports and condition rules to report on the proration state of all your leave requests.

Related Information

Tasks

Create Time Off Plans That Track Balances on page 2126
Create Statutory Leave Types for UK Payroll
Steps: Set Up Reclassification Leaves (FRA)
Steps: Report Part-Time Therapeutic Leave in DSNs (FRA)
Steps: Set Up DSN Reporting (FRA)
Steps: Set Up an Adjusted Seniority Calculation (FRA)
Steps: Set Up the Absence Calendar Experience on page 2072

Reference

Reference: Leave Impacts on page 2373
Reference: Additional Fields for Leave Types on page 2370
2024R2 Feature Release Note: Leave Units Proration Based on Percentage
The Next Level: New Absence Calendar Experience Next Level Series
The Next Level: Using Absence to Record Furloughed Leave
The Next Level: PATT Touchpoints with Assignments

Examples

Example: Set Up Cascading Leave on page 2384

Schedule Leave Type Effects Synchronization

Prerequisites

Security: *Set Up: Leave of Absence* domain in the Time Off and Leave functional area.

Context

You can synchronize your leave type configurations on all existing leave request events if you've changed your configuration on the **Edit Leave Type** task after workers have already requested leave. You can synchronize changes to the:

- **Leave Impacts** section (on the **Details** tab).
- **Prorate by Leave Percentage** setting (on the **Balance/Leave Taken** tab).

These changes indicate whether:

- The leave event impacts other areas in Workday for workers.
- To prorate leave units by the value of the **Leave Percentage** additional field on the request.

Steps

1. Access the **Schedule Leave Type Effects Synchronization** task.
2. Enter a **Request Name** for the background process so that you can later easily identify the job in the **Process Monitor**.
3. As you complete the **Synchronize Leave Type Effects Processing** tab, consider:

option	Description
Leave Types	Select 1 or more leave types to synchronize.
Professional Leave Effect	Select to indicate that the related leave type is a professional leave type, which might affect the timing of professional leave eligibility.
Prorate by Leave Percentage	Select to prorate the number of leave units by the value of the **Leave Percentage** additional field on the request. Workday reduces the worker's balance entitlement by a prorated amount when the leave isn't full time.
Sabbatical Effect	Select to indicate that the related leave type is a sabbatical leave type, which might affect the timing of sabbatical eligibility.
Scheduling Effect	Select to indicate that the related leave type is a scheduling leave type. You can schedule workers to work while on this type of leave.
Talent Effect	Select to indicate that Workday should remove the worker on this type of leave from the **Worker** prompt of specific employee reviews and feedback in Talent.
Tenure Effect	Select to indicate that the related leave type is a tenure leave type and might affect the timing of tenure eligibility.

4. (Optional) Select **Start Date** and **End Date** values to synchronize successfully completed leave events within a date range. For the date range, you can specify a start date, end date, or both. If you don't select any dates, Workday synchronizes all leave events.
5. (Optional) As you complete the **Schedule** tab, consider:

Option	Description
Priority	Setting a higher priority can reduce potential queuing. Workday launches *Critical* priority jobs first, and processes them in any order. Workday repeats this process for each lower priority category, in order of priority.
Run Once in the Future	Select all of these values to schedule the synchronization process to run on a specific date, at a specific time, and in a specific time zone. If you don't specify all of these values, Workday runs the process immediately.

6. Click **OK**.

Concept: Cascading Leave

Cascading leaves streamline the process of moving workers from one leave type to another, such as from paid to unpaid maternity leave. You define the sequence of leave types and conditions that ends 1 leave type and begins the next. When a leave ends, Workday generates a request to return the worker from leave and a separate request to begin the next leave.

Note: Workday Payroll for the UK doesn't support cascading leave types that are linked to statutory payments, except for Statutory Sick Pay.

Defining Conditions for Triggering the Next Leave

- Define the sequence of leaves by identifying the **Next Leave Type** for each leave. You can use either the **Create Leave Type** or the **Edit Leave Type** task.
- Add the *Automated Leave Processing* service with a step delay, after the completion step to the *Request Leave of Absence* business process.

The Automated Leave Processing Service

- The service generates a return request for all leaves, including returns that aren’t part of a cascade.

  Limit automation of return requests to cascading leaves. Add condition rules to the service step in the business process, specifying which leave types to include or exclude.
- The step delay controls when to generate requests to return workers from leave and start the next leave.

  You can use the *Last Date of Entitlement or Estimated Last Day or Actual Return Date* report field to create a step delay condition. This report field returns either:

  - The last day of entitlement if the leave type used in the request tracks balances.
  - The estimated last day of leave if the leave type doesn't track balances.
  - The date on which the workers exhaust their leave balance entitlement.

  The report field can't return an actual return date when used in a step delay for the *Automated Leave Process* service. The date isn't available until after the service initiates the *Request Return from Leave of Absence* business process.

  You can also use calculated date fields to define step delay rules for different sets of workers, leaves, or both.
- A leave request reaches the completion step in the business process. The delay step then sets the return date and doesn't adjust it in response to subsequent changes.

  Example: The delay step uses the **Estimated Last Day of Leave**. A manager approves and completes a leave request with an **Estimated Last Day of Leave** of July 11. The administrator then changes the date to August 11. Workday generates the return request for July 11.

When a Worker's Leave Ends

The *Automated Leave Processing* service checks daily for workers who meet the conditions for ending the leave that the delay step specifies. For workers who meet these conditions, Workday generates:

- A request to return the worker from leave. The value of **Actual Last Day of Leave** uses the sent date of the return request.

  Note: Workday generates a return request if the manager placed the worker on leave or the leave cascaded from another leave type.

- A request to start the next leave type if the worker meets its eligibility requirements. It displays the:
  - **Leave Type**.
  - **Last Day of Work**. The same date for all leaves in the sequence.
  - **First Day of Leave**. The **Actual Last Day of Leave** + 1 day. It considers **Days to Include** as defined for the next leave type.
  - **Estimated Last Day of Leave**.
    - Leave types that track balances: Workday determines this date from the entitlement.
    - Leave types that don't track balances: Workday displays the **Estimated Last Day of Leave** from the previous leave if the date is before the first day of the new leave.
  - Data entered under the **Additional Fields** section, if the previous request had the same fields.

  The reviewer enters the **Leave Reason**.

  Workday doesn’t copy the original leave reason to the next leave type. You can access the **Leave Results for Worker** report to view the original leave reason for the leave result item in the **Reason** column.

  Note: Workday generates requests for the next leave with warnings if it has validation warnings or errors.

Preventing the Leave of a Worker from Cascading

To prevent the leave for a worker from cascading, you can:

- Return the worker from leave before Workday generates the next leave request.
- Deny the next leave request.

If your *Request Leave of Absence* business process sets leave requests to the completion step without requiring approval, you can rescind the next leave.

Leave Request Routing

The initiator of the original leave request is the initiator of the return request and the next leave request.

Create a condition rule in the business process to identify requests for cascading leave that you want to route differently. You can use the *Leave Event is Part of Cascade* report field as the condition rule.

Report Fields for Cascading Leaves

- *Cascading Leave Event - Succeeding*
- *Leave Type for succeeding cascading Leave Event*
- *Cascading Leave Event - Preceding*
- *Leave Type for preceding cascading Leave Event*
- *Leave Event is Part of Cascade*

Viewing the Sequence of Leaves

To see the full sequence of leaves for a cascading leave, access either of these reports:

- **View Leave Family**
- **All Leave Families**

Related Information
Tasks

Create Leave Types on page 2356

Examples

Example: Set Up Cascading Leave on page 2384
Example: Set Up Supplemental Sick Leave at Reducing Rates of Pay on page 2387

Concept: Coordinated Leaves and Time Off

You can configure Workday to calculate balances for multiple leave types and time offs. Example: The balance for long-term disability can reflect days taken for short-term or long-term disability. Validation rules can check whether a worker has a sufficient balance across linked leave types and time offs for their request.

Workday deducts intermittent time off that's linked to a leave type for leave of absence from both the time off plan balance and the leave entitlement balance. A leave validation that checks whether sufficient balance exists can trigger for a time off request even though the time off plan has an available balance because Workday evaluates the time off and leave of absence balances independently. You can also enable workers to take leave of absence without placing them on leave, by configuring a time off on a time off plan that doesn't track balance, and then selecting that time off as an intermittent time off on a leave type.

To link related leave types and time offs to a source leave type, use the **Create Leave Type** task. These conditions apply:

- Leave types and time offs must use the same unit of time.
- You can link leave types and time offs, even if the time offs have different position-based settings.
- You can associate a time off type with one leave type only.
- Time off requests are subject to:
  - The eligibility and validation rules defined for the leave type.
  - The time off eligibility and validation rules.

  Workday applies the eligibility requirements defined for the time off first.

Calculating Leave Entitlement

When calculating the entitlement balance for coordinated leaves and time off, Workday:

- Calculates the entitlement for the requested leave type as of the leave start date (or *as of* date, if generating reports).
- Applies the **Days to Include** option defined for each leave type to count the number of leave days taken.
- Reduces the leave balance by the sum of the leave days and time off taken.

Related Information
Tasks

Create Leave Types on page 2356

Examples

Example: Track Balances for Coordinated Leaves and Time Off on page 2380
Example: Display Balances for Plans with Intermittent Time Off on page 2195

Concept: Calculating Leave Taken

To determine the number of days to count as taken for a leave request, Workday:

- Uses the **Days to Include** option on the **Balance/Leave Taken** tab of the **Create Leave Type** task.
- Calculates the hours for each day taken, if the leave type is hourly.
- Takes the total scheduled hours for a worker across all eligible positions and divides it by the number of days in the week.
- Prorates leave units if you select **Prorate by Leave Percentage** for the leave type and workers enter a leave percentage on the leave request.

Options that reference work days require a holiday calendar and a work schedule calendar.

This table explains how Workday determines days and hours taken for each option:

Days to Include	Days Counted as Taken	Hours Counted for Each Day Taken	Example
All Days	Every day	Scheduled weekly hours divided by 7.	Jane is scheduled to work 35 hours a week. Each day of leave is equal to 35 ÷ 7, or 5 hours.
Weekdays (Mon - Fri)	Monday through Friday only.	Scheduled weekly hours divided by 5. Workday ignores weekends.	Dawn is scheduled to work 35 hours each week. Each day of leave on a weekday equals 35 ÷ 5, or 7 hours. Workday doesn't count hours for Saturday or Sunday.
Workdays (Non-Holiday)	Work days the worker is scheduled to work, excluding work days that are holidays.	Scheduled hours for the leave date, as determined by the work schedule and holiday schedule. Workday doesn't include hours during holidays, even if the worker is scheduled to work that day.	Hahn is scheduled to work: • 9 hours on Monday. • 8 hours on Tuesday. • 8 hours on Wednesday, a holiday. Workday counts 9 hours for Monday, 8 hours for Tuesday, and no hours for Wednesday.
Workdays (Work Hours Exceed Holiday Hours)	Work days the worker is scheduled to work, including work days that are holidays, if the scheduled hours exceed the holiday hours.	Scheduled hours for the leave date, based on the work schedule, minus any holiday hours for the same day.	Robert is scheduled to work 8 hours on Monday but has 4 hours of holiday that day. Workday counts 4 hours as leave for Monday. Workday doesn't count hours for a day that Robert books 8 hours of holiday. Even if he's scheduled to work 4 hours on that day.
Configure Days to Include	Days defined in the **Included Days** prompt. Select the **Include Holidays from the Holiday Calendar** check box to include holidays.	Scheduled hours for the leave date. Select the **Include Holidays from the Holiday Calendar** check box to include hours from holidays.	David requests leaves from Sunday through Friday, Workday counts leaves from his scheduled days; Sunday through Thursday.

Related Information
Tasks

Create Leave Types on page 2356

Steps: Create Calendars

Concept: Leave of Absence Business Processes

Workday provides 2 business processes for leaves of absence:

- *Request Leave of Absence*
- *Request Return from Leave of Absence*

Configure the business process definitions for your organizations to route requests to the appropriate roles for review and approval. You can also add steps for specific roles.

This table lists the steps you can add to each business process. All are action steps, except the *Automated Leave Processing* service.

Action or Service	Description	*Request Leave of Absence*	*Request Return from Leave of Absence*
Review Leave of Absence	Require one or more roles to approve leave requests.	X	
Review Return from Leave of Absence	Require one or more roles to approve requests to return from leave.		X
Automated Leave Processing	Generate requests to return workers from leave when specified conditions are met. When you configure leave types for cascading leave, the service also generates requests to place eligible workers on the next leave in the sequence.	X	
Change Benefit Elections	Determine if a leave of absence or return from leave affects an employee's benefit coverage.	X	X
Request Delegation Change	Enable users to delegate their business process step to another user.	X	X
Review COBRA Eligibility	Enable selected roles to review and identify COBRA eligibility. You can set up a condition rule that triggers this step only in the U.S.	X	
Edit Service Dates	Enable users to update service dates manually, such as the continuous service date. You can set up a condition rule to trigger this action if the leave type affects the continuous service date.		X

Action or Service	Description	*Request Leave of Absence*	*Request Return from Leave of Absence*
Review Payroll Interface Data Extract	Generate a data extract of the leave request for review by the Payroll Administrator before extracting data to a third-party payroll system. That system then uses the leave dates to set the worker as active or inactive in payroll according to policy.	X	X
Assign Roles	Enable users to request a change to the organization role (or roles) of a worker when the worker takes a leave of absence or returns from leave.	X	X
Manage Business Processes for Worker	Enable users to reassign Workday tasks that are currently assigned to a worker who is taking a leave of absence.	X	
Request Compensation Change for Leave of Absence	Enable users to request a change to the compensation of a worker when the worker takes a leave of absence or returns from leave.	X	X

Related Information
Tasks

Edit Business Processes

Steps: Set Up Automatic Benefit Eligibility Checks on page 1248

Reference: Additional Fields for Leave Types

Additional fields enable you to capture data related to global statutory requirements. You can use the information captured by the additional fields for any purpose, such as determining eligibility or balances. Configure an absence rule that references the field that performs the calculation or validation.

Additional Field	Description	Example
Adoption Notification Date	The date of the formal notification of adoption. Used in Workday Payroll for the UK for Statutory Adoption Pay, Ordinary Paternity Leave, and Statutory Shared Parental Pay.	

Additional Field	Description	Example
Adoption Placement Date	The date the adopted child places with one or more adoptive parents.	
Age of Dependent	The age of the dependent associated with the leave request.	
Case Number	The case number for the leave event.	
Cesarean Section Birth	Some leaves calculate entitlements based on whether the parent has had a cesarean section.	
Child's Birth Date	The date of birth of the child associated with the leave request.	
Child Disability Indicator	Child disability can impact some leave entitlements. You can use this field for social insurance reporting requirements and to potentially increase entitlement for the worker.	
Date Baby Arrived Home From Hospital	The date when the baby associated with the leave request arrived home from the hospital.	In the Netherlands, the spouse or partner of the mother of a newborn child has an entitlement to 2 days of paid paternity leave. Take the leave within the first 4 weeks of the baby's birth, if born at home. Take the leave from the date that the baby came home, if born in a hospital.
Date Child Entered Country	The date that a child adopted from overseas entered the country. Used in Workday Payroll for the UK for Statutory Adoption Pay, Ordinary Paternity Leave, and Statutory Shared Parental Pay.	
Date of Recall	Used for the Record of Employment (ROE) report in Canada.	
Dependent Detail	The name of a spouse or partner. Used in Workday Payroll for the UK for Statutory Shared Parental Pay.	
Expected Due Date	The child's expected birth date. Used in Workday Payroll for the UK for Statutory Maternity Pay, Ordinary Paternity Leave, and Statutory Shared Parental Pay.	In the UK, the earliest that a maternity leave can start is usually 11 weeks before the expected due date.

Additional Field	Description	Example
Last Date for Which Paid	Used for the Record of Employment (ROE) report in Canada.	
Leave Entitlement Override	Used to override a worker's original leave entitlement. You can also use it to enter an entitlement that Workday can't calculate. Example: When you store the calculation's required data stored outside of Workday. The override units match the leave entitlement units. The maximum leave entitlement override is 99,999.	Jonathan works for a Workday customer in the UK, unlike his wife Adeyola. Jonathan wishes to take Shared Parental Leave. His legal entitlement depends upon how much maternity leave Adeyola has taken. Set Jonathan's new entitlement limit. Example: Jonathan's entitlement is less than the maximum because of the maternity leave his wife has already taken.
Leave Percentage	Used when workers take partial leave of absence, this field enables workers to enter the percentage of time they want to take when they're requesting leave. When you enable proration on the leave type, Workday prorates the leave units taken by the leave percentage and reduces the leave entitlement balance accordingly. The maximum leave percentage is 100. Typically, workers enter a value between 1 and 100 to indicate the percentage of leave they want to take. Workers should only enter a decimal value of less than 1 when they want to indicate a value lower than 1 percent.	Due to a medical condition, Nicolas works half days for a month. On the leave request, he enters 50 in the **Leave Percentage** field to indicate 50 percent and not 0.50.
Location During Leave	The location for a worker on leave at another academic institution.	
Multiple Child Indicator	Multiple births, such as twins, can impact some leave entitlements.	
Number of Babies/Adopted Children	Some leaves calculate entitlements based on the number of children born or adopted at the same time. You can use this option along with the Multiple Child Indicator or independently.	In Norway, parents have 5 additional weeks of parental leave at 100% pay for their first child. They have 7 additional weeks at 80% pay per additional child.
Number of Child Dependents	Some leaves calculate entitlements based on the total number of child dependents.	In France, parents receive different entitlements for adoption leaves based on the number of child dependents they have before the adoption.

Additional Field	Description	Example
Number of Previous Births	Some leaves calculate entitlements based on the number of previous births that a mother has had.	
Number of Previous Maternity Leaves	Some leaves calculate entitlements based on the number of previous maternity leaves a mother has taken.	
Single Parent Indicator	Some leaves calculate entitlements based on whether the parent is a single parent.	
Social Security Disability Code	Used for the Mexican Social Security Institute (IMSS) Folio Code associated with long term leaves. Mexican authorities issue this number to reconcile government disability payments with the worker's absence from work.	
Stillbirth/Baby Deceased	Some leaves calculate entitlements based on whether a baby is stillborn or dies soon after birth.	
Stop Payment Date	The date that a leave payment should end. Used in Workday Payroll for the UK for Additional Statutory Paternity Pay (ASPP). However, ASPP has been replaced by Statutory Shared Parental Pay and is no longer in use.	
Week of Confinement	The Sunday before a child's due date.	
Work Related	Used for the Record of Employment (ROE) report in Canada.	

Related Information
Tasks

Create Leave Types on page 2356

Create Leave of Absence Rules on page 2354

Reference: Leave Impacts

Use leave impacts to indicate whether a certain leave type will impact workers in other areas of Workday. Selecting a leave impact doesn't affect how Workday responds when a worker is on leave, except for these leave impacts:

- **Inactivate Worker**

- **Payroll Effect**

Use the **Schedule Leave Type Effects Synchronization** task to update these leave impacts on all existing leave events of a leave type if you've changed your leave type configuration after workers have already requested leave:

- **Professional Leave Effect**
- **Sabbatical Effect**
- **Scheduling Effect**
- **Talent Effect**
- **Tenure Effect**

Note: Workday sets the leave impacts when processing the request but doesn't automatically update a leave of absence record when the leave type configuration changes. You can update an existing leave request for a worker to reflect the new configuration. Use the **Business Process** > **Correct** related action on the leave request and resubmit the request without making changes.

To trigger certain actions when a worker is on leave, build rules using the report fields to detect those events.

Leave Impact	Description	Report Fields
Absence Accrual Effect	Indicates workers' leaves might affect time off accrual. You can configure eligibility criteria for a time off plan or accrual to prevent a worker from accruing time off while on a leave type with this effect. You can use these calculations to configure eligibility: • *On Leave as of Period Start Date with Absence Accrual Effect* • *On Leave as of Period End Date with Absence Accrual Effect*	**Effect - Absence Accrual**
Benefit Effect	Indicates that the leave might require a change to the employee's benefits. To change the employee's benefit elections, report a life event and update the benefit elections accordingly. You can create condition rules for the business process to create To Dos and additional approvals.	**Effect - Benefits**
Continuous Service Accrual Effect	Indicates whether the leave requires a change to the employee's service accrual. This change might involve a manual change to the continuous service date of the employee.	

Leave Impact	Description	Report Fields
	You can create condition rules for the business process to create To Dos and additional approvals.	
Inactivate Worker	Changes a worker's status to Inactive while on leave, but doesn't lock workers out of their Workday account. To prevent workers from accessing their Workday account while on leave, you must lock their Workday account. Selecting this leave impact affects headcount reporting and these web services: • *Get Leave Family* • *Get Leave Type* • *Put Leave Family* • *Put Leave Type* When the leave type is position-based, Workday changes the worker's status to Inactive only if all of the worker's positions are on leave with this effect.	**Effect - Inactivate Worker** **Inactivate Employee**
Payroll Effect	When selected, workers aren't paid while on leave. However, if you're using Workday Payroll, you can continue to pay workers on leave according to run category criteria. Example: You can configure Workday Payroll to calculate medical deductions automatically while workers are on leave.	**Effect - Payroll**
Professional Leave Effect	Indicates whether the related leave type is a professional leave type. Professional leaves affect the timing of professional leave eligibility, which might require a manual change to a worker's professional leave records.	**Professional Leave Effect**
Sabbatical Effect	Indicates whether this leave affects the timing of sabbatical eligibility. If the leave impacts sabbatical eligibility, you might need to change the employee's sabbatical records manually.	**Effect - Sabbatical Effect**

Leave Impact	Description	Report Fields
Scheduling Effect	Indicates that you can schedule workers to work while on this type of leave.	**Leave Impact – Scheduling**
Stock Vesting Effect	Indicates that the leave might require a change to the employee's vesting schedule for stock grants. You can create condition rules for the business process to create To Dos and additional approvals.	**Effect - Stock Vesting**
Talent Effect	When you select this leave impact, Workday removes workers on this type of leave from the **Worker** prompt of select employee reviews and feedback in talent.	**Talent Effect**
Tenure Effect	Indicates whether this leave affects the timing of tenure eligibility, which might require a manual change to the employee's tenure records.	**Effect - Tenure Effect**

Related Information
Tasks

Correct Leave of Absence Requests on page 2398

Create Leave Types on page 2356

Steps: Configure Additional Reviewers for Competencies on page 1532

Steps: Set Up Feedback on page 1621

Steps: Set Up Pay Run Categories

Reference

The Next Level: Using Absence to Record Furloughed Leave

Reference: Balance Calendars

Leave types that track balances require start and end dates that specify the period or balance calendar over which to calculate leave balances. A leave balance is the worker's entitlement minus the leave taken. You can create calculated fields for the start and end dates of common balance calendars. When creating or editing leave types, you can then select these calculated fields from the **Balance Calendar Start Date** and **Balance Calendar End Date** prompt on the **Balance/Leave Taken** tab. This table includes examples of calculated fields that you might need to configure for each type of calendar. When selecting calculated fields to use for the calendar, drill into the calculated field to view the report field that it uses to extract the value for the date.

Balance Calendar	Start Date	End Date	Recommendations
Anniversary-Based (Hire Date)	*Leave Balance Calendar - Hire Date (Month and Day) of Leave Event Year*	*Leave Balance Calendar - Hire Date (Month and Day) of Leave Event plus 12 months*	Ensure that the calculated field is based on the **Leave Balance Calendar Start Date** report field.

Balance Calendar	Start Date	End Date	Recommendations
Fixed Calendar (01-Jan to 31-Dec)	*Leave Balance Calendar - January 1 of Leave Event Year*	*Leave Balance Calendar - December 31 of Leave Event Year*	Ensure that the calculated field is based on the **Leave Balance Calendar Start Date** report field.
Rolling-Backward (12-Month)	*Leave Balance Calendar - Effective Date (First Day of leave) minus 12 months*	*Effective Date of Leave Event*	Ensure that the calculated field is based on the **Leave Balance Calendar Start Date** report field.
Rolling-Forward (12-Month)	*Leave Balance Calendar - Effective Date (First Day of Leave)*	*Leave Balance Calendar - Effective Date (First Day of Leave) plus 12 months*	Ensure that the calculated field is based on the **First Day of Active Leave Balance Period or Leave Request** report field.

Related Information
Tasks

Create Leave Types on page 2356

FAQ: How do I tell workers what documents to submit for leaves of absence?

How do I tell workers what documents to submit for leaves of absence?

You can add instructional text to steps in the leave of absence business processes. Example: Add a message to the initiation step of the *Request Leave of Absence* business process that reads: Review the Leave Policy Document for required documentation.

You can also associate condition rules with the review step to display for reviewers a list of the documents required for the requested leave type.

Related Information
Concepts

Concept: Leave of Absence Business Processes on page 2368

Example: Create Leave of Absence Rules for Leave Type

Context

This example illustrates how to:

- Make employees who complete 6 months of service eligible for education leave.
- Require workers to enter a comment and attach supporting documentation when requesting leave of absence for educational purposes. Example: Workers might need to attach a document that verifies their upcoming exam schedule or college registration details.

Prerequisites

- Create a leave type named Education. See Create Leave Types on page 2356.
- Security: *Set Up: Leave of Absence* domain in the Time Off and Leave functional area.

Steps

1. Access the **Create Leave of Absence Rule** task.

2. In the **Description** field, enter *Months of Service > 6*.
3. In the **Rule Conditions** grid, enter these values:

Option	Value
Source External Field or Condition Rule	*Length of Service in Months from Continuous Service Date*
Relational Operator	*greater than*
Comparison Type	*Value specified in this filter*
Comparison Value	*6*

4. Click **OK**.
5. Access the **Create Leave of Absence Rule** task.
6. In the **Description** field, enter *Comment Mandatory*.
7. In the **Rule Conditions** grid, enter these values:

Option	Value
Source External Field or Condition Rule	*Comment is included on a Leave of Absence Event*
Relational Operator	*is not blank*
Comparison Type	*Value specified in this filter*

8. Click **OK**.
9. Access the **Create Leave of Absence Rule** task.
10. In the **Description** field, enter *Supporting Document Mandatory*.
11. In the **Rule Conditions** grid, enter these values:

Option	Value
Source External Field or Condition Rule	*Document is linked to Leave of Absence Event*
Relational Operator	*is not blank*
Comparison Type	*Value specified in this filter*

12. Click **OK**.
13. Access the **Edit Leave Type** task.
14. Select *Education* from the **Leave Type** prompt.
15. On the **Details** tab, select *Months of Service > 6* from the **Additional Criteria** prompt.
16. On the **Validations / Supporting Data** tab, add 2 rows to the **Validations** grid and enter these values:

	Leave of Absence Rule	Do Not Allow Request
Row 1	*Comment Mandatory*	Select
Row 2	*Supporting Document Mandatory*	Select

17. Click **OK** and **Done**.

Example: Require Workers to Use Time Off Before FMLA

This example illustrates how to define a rule that hides a leave type from workers who haven't exhausted a specific time off plan balance as of the first day of their request.

Context

You want to set up a leave type for FMLA so that workers must exhaust their balance on a time off plan for paid time off (PTO) before they can request leave.

Prerequisites

Create the FMLA leave type. Example: *FMLA> USA FMLA Non-Military*.

Security:

- *Custom Field Management* domain in the System functional area.
- *Set Up: Leave of Absence* domain in the Time Off and Leave functional area.

Steps

1. Access the **Create Calculated Field** task.

   Create a true/false condition that determines which time off plan to check when a worker enters the dates for a leave of absence request.

   a) Enter these values:

Field	Value
Field Name	*Time Off Plan is USA Paid Time Off (Salaried)*
Business Object	*Time Off Plan*
Function	*True/False Condition*

   b) Click **OK**.

   c) Select these values on the **Calculation** tab:

Field	Value
Field	*Time Off Plan*
Operator	*in the selection list*
Comparison Type	*Value specified in this filter*
Comparison Value	Select the time off plan that you want to check. Example: *USA Paid Time Off (Salaried)*.

2. Click **Create Another Calculation**.

   Create a calculation that retrieves the time off plan balance when *Time Off Plan is USA Paid Time Off (Salaried)* is true.

   a) Enter these values:

Field	Value
Field Name	*Retrieve Time Off Plan Balance of USA Paid Time Off (Salaried)*
Business Object	*Worker*
Function	*Sum Related Instances*

   b) Click **OK**.

   c) Select these values on the **Calculation** tab:

Field	Value
Related Field	*All Eligible Time Off Plans for Worker*

Field	Value
Sum	*Instances where condition is true* *Time Off Plan is USA Paid Time Off (Salaried)*
Field to Sum	*Time Off Balance for Worker*

d) Click **OK**.
e) Click **Done**.

3. Access the **Create Leave of Absence Rule** task.

a) As you complete the task, consider:

Field	Value
Description	*PTO Balance Must Be Used Before FMLA Can Be Requested*
Comment	*True if the PTO time off plan balance is less than or equal to zero. You can use this rule in an Absence eligibility rule. Workday evaluates the balance as of the First Day of Leave.*
And/Or	*And*
Source External Field or Condition Rule	*Retrieve Time Off Plan Balance of USA Paid Time Off (Salaried)*
Relational Operator	*less than or equal to*
Comparison Type	*Value specified in this filter*
Comparison Value	Zero

b) Click **OK**.

4. Access the **Edit Leave Type** task for the FMLA leave.

a) Select the leave type. Example: *FMLA> USA FMLA Non-Military*.
b) Click **OK**.
c) On the **Details** tab, in the **Eligibility Criteria** section, select the new *PTO Balance Must Be Used Before FMLA Can Be Requested* rule from the **Additional Criteria** prompt.

   When workers request this leave, Workday checks their eligibility as of the first day of leave.
d) Click **OK**.

Result

When requesting leave of absence, after they select the first day of absence, eligible workers can select the leave type if their PTO balance is less than or equal to zero. Managers can select the leave type when entering absence on behalf of their eligible workers.

Related Information
Tasks

Create Leave Types on page 2356

Example: Track Balances for Coordinated Leaves and Time Off

This example illustrates how to create validation rules that track balances for coordinated leaves and time off.

Context

Your organization wants to track balances for the *FMLA* and *FMLA - Military* leave types to prevent employees from exceeding annual entitlement limits of 60 days for *FMLA* leave and 130 days for *FMLA - Military* leave. You also want to reduce the balance for *FMLA* leave by time off taken as intermittent FMLA.

Prerequisites

- Create:
  - An *FMLA Time Off Plan* and an *Intermittent FMLA* time off that subtracts from the plan balance. Don't define an accrual; time off taken reduces the *FMLA* leave entitlement balance instead.
  - A leave of absence rule called *Continuous Service Months >=12* to use as an eligibility rule.
- Security: *Set Up: Leave of Absence* domain in the Time Off and Leave functional area.

Steps

1. Access the **Maintain Leave Families** task and create a leave family called *Family Medical Leave*.
2. Access the **Create Leave of Absence Rule** task.

   Create a rule that compares the combined balance of time already taken for *FMLA* leave, *FMLA - Military* leave, and *Intermittent FMLA* time off to an employee's remaining leave entitlement. This rule determines if the remaining entitlement is sufficient to cover a new leave or time off request.

Field	Value
Description	*Sufficient Balance Exists*
Source External Field or Condition Rule	*Sufficient Balance Exists for Leave or Time Off Request*
Relational Operator	*equal to*
Comparison Type	*Value specified in this filter*
Comparison Value	*True*

3. Access the **Create Leave Type** task and create an *FMLA* leave type:
   a) On the **Details** tab, select:

Field	Value
Leave Type	*FMLA*
Leave Family	*Family Medical Leave*
Country / Country Region	*United States of America*
Additional Criteria	*Continuous Service Months >=12*

   Note: Workday also applies the eligibility criteria to requests for *Intermittent FMLA* time off.

   b) On the **Validations/Supporting Data** tab, select the **Validations** that apply to requests for *FMLA* leave and *Intermittent FMLA* time off:

Field	Value
Leave of Absence Rule	*Sufficient Balance Exists*

Field	Value
Do Not Allow Request	Select the check box.

If you want to apply the same validation to requests for *FMLA - Military* leave, add it to the leave type too.

c) On the **Balance/Leave Taken** tab, enter:

Field	Description
Track Balance	Select the check box.
Balance Calendar Start Date	*Leave Balance Calendar - Effective Date (First Day of Leave) minus 12 months*
Balance Calendar End Date	*Effective Date of Leave Event*
Unit of Time	*Days*
Entitlement Units (Numeric)	*60*
Days to Include	*Weekdays (Mon-Fri)*
Include all Leave Types from Leave Family	Select the check box.
Intermittent Time Off	*Intermittent FMLA*

Note: Because *FMLA - Military* and *FMLA* belong to the same family and are the only members of that family, you can select **Include all Leave Types from Leave Family**. Alternatively, you can select *FMLA - Military* in the **Additional Leave Types** field. However, you must also select *FMLA* as an additional leave type when you define *FMLA - Military* leave.

4. Create a leave type for *FMLA - Military* leave:

a) On the **Details** tab, select *Family Medical Leave* as the **Leave Family**.

b) On the **Balance/Leave Taken** tab, enter:

Option	Description
Track Balance	Select the check box.
Balance Calendar Start Date	*Leave Balance Calendar - Effective Date (First Day of Leave) minus 12 months*
Balance Calendar End Date	*Effective Date of Leave Event*
Unit of Time	*Days*
Entitlement Units (Numeric)	*130*
Days to Include	*Weekdays (Mon-Fri)*
Include All Leave Types from Leave Family	Select the check box.

Result

When employees enter requests for *FMLA* leave, *FMLA - Military* leave, or *Intermittent FMLA* time off, Workday checks the combined amount of leave and time taken to determine if they have enough entitlement to cover the current request.

When employees request *FMLA* leave, *FMLA-Military* leave, or *Intermittent FMLA* time off, Workday:

- Checks the combined amount of leave and time taken.
- Determines if they have enough entitlement to cover the current request.

Example results:

- Julie has taken 55 days of *FMLA* leave over the last 12 months. She enters a new request for 10 days of *Intermittent FMLA* time off. The validation rule checks her FMLA entitlement balance for each day of requested time off. It generates an error for days 6 through 10, because she'll have exhausted her FMLA entitlement.
- Larry enters a request for 15 days of *FMLA* leave. He's already taken 50 days of *FMLA - Military* leave within the last 12 months. Workday generates an error for the last 5 days of his request because Larry's *FMLA* entitlement balance has already been reduced by the 50 days of leave taken for *FMLA - Military*.

Related Information

Concepts

Concept: Coordinated Leaves and Time Off on page 2367

Tasks

Create Leave Types on page 2356

Create Leave of Absence Rules on page 2354

Examples

Example: Display Balances for Plans with Intermittent Time Off on page 2195

Example: Track Balances Rolling Forward for Coordinated Leaves and Time Off

This example illustrates how to use the **First Day of Active Leave Balance Period or Leave Request** report field in calculated fields within leave types to track balances rolling forward for coordinated leaves and time off. This helps ensure that events that cross periods are linked to the correct period.

Context

Your organization wants to track balances for Family or Medical Leave of Absence (FMLA) leave taken by measuring forward from the first day of leave.

Prerequisites

Create an FMLA leave type.

Security:

- *Custom Field Management* domain in System functional area.
- *Set Up: Leave of Absence* domain in Time Off and Leave functional area.

Steps

1. Access the **Create Calculated Field** task.

   Create a calculated field that extracts the start date from the leave request event.

   a) Enter these values:

Field	Value
Field Name	*Rolling Forward - Start Date*
Business Object	*Leave Request Event*
Function	*Build Date*

   b) Click **OK** and enter these values on the **Calculation** tab:

Field	Value
Extract Year from Date Field	*First Day of Active Leave Balance Period or Leave Request*

Field	Value
Extract Month from Date Field	*First Day of Active Leave Balance Period or Leave Request*
Extract Day from Date Field	*First Day of Active Leave Balance Period or Leave Request*

2. Click **OK** and **Create Another Calculation** to create a calculated field that extracts the end date.
   a) Enter these values:

Field	Value
Field Name	*Rolling Forward - End Date*
Business Object	*Leave Request Event*
Function	*Increment or Decrement Date*

   b) Click **OK** and enter these values on the **Calculation** tab:

Field	Value
Date Field	*Rolling Forward - Start Date*
Years to Add or Subtract	*1*
Days to Add or Subtract	*-1*

   c) Click **Done**.
3. Access the **Edit Leave Type** task and select the FMLA leave type.
4. Select the **Balance/Leave Taken** tab and enter these values:

Field	Value
Track Balance	Select this check box.
Balance Calendar Start Date	Select the new *Rolling Forward - Start Date* calculated field.
Balance Calendar End Date	Select the new *Rolling Forward - End Date* calculated field.
Unit of Time	*Days*

Result

Example results:

Rachel began her FMLA leave on 2021-07-01 and is using it intermittently to care for her spouse. Rachel asks for an update on how much leave she has left on 2021-08-01. You can use the **Leave Results for Worker** report to find out how much leave she used between 2021-07-01 and 2021-08-01. Rachel has until 2022-08-01 to use her entire 12 weeks. So far, she only used 2 days, so she has 58 days left.

Example: Set Up Cascading Leave

This example illustrates how to configure:

- Short-term leave to cascade to long-term leave when entitlement for short-term leave depletes.
- Long-term leave to cascade to personal leave when entitlement for long-term leave depletes.

Context

At your company, when employees use up their short-term leave entitlements, they move to long-term leave, and then when long-term leave depletes, to personal leave. Set up cascading leaves to make this process as streamlined as possible.

Prerequisites

Define these leave types to track balances, making all either position-based or worker-based:

- *Short-Term Leave*
- *Long-Term Leave*
- *Personal Leave*

Security: These domains in the System functional area:

- *Business Process Administration*
- *Manage: Business Process Definitions*
- *Set Up: Tenant Setup - BP and Notifications*

Set Up: Leave of Absence domain in the Time Off and Leave functional area.

Steps

1. Configure *Short-Term Leave* to cascade to *Long-Term Leave*:
   a) Access the **Edit Leave Type** task.
   b) Select the *Short-Term Leave* **Leave Type**.
   c) On the **Cascading Leave** tab, select *Long-Term Leave* as the **Next Leave Type**.
2. Configure *Long-Term Leave* to cascade to *Personal Leave*:
   a) Access the **Edit Leave Type** task.
   b) Select the *Long-Term Leave* **Leave Type**.
   c) On the **Cascading Leave** tab, select *Personal Leave* as the **Next Leave Type**.
3. Configure the *Request Leave of Absence* business process to support cascading leaves:
   a) From the related actions menu of the business process, select **Business Process** > **Edit Definition**.
   b) In the **Business Process Steps** grid, add a step with these values after the completion step and click **OK**:

Field	**Value**
Type	*Service*

Field	Value
Specify	*Automated Leave Processing*

When you add this service step, Workday automatically adds this step condition:

This Leave Request is not returned or in the process of returning

This condition prevents automated leave processing from running on leaves when Workday is in the process of returning workers from these leaves.

Automated leave processing can automatically:

- Initiate the *Return from Leave* business process when workers use up all of their leave entitlement or reach their estimated last day of leave.
- Return workers from leave when you configure the *Termination* business process to synchronize termination and return-from-leave dates for employees terminated while on leave.
- Return workers from leave and cascade them from 1 leave to the next when they exhaust their entitlements.

Note: If your *Request Leave of Absence* or *Request Return from Leave of Absence* business process has other steps such as *Approval*, *To Do*, and so on, Workday respects those steps. The *Automated Leave Processing* step only automates the initiation step.

Automated Leave Processing doesn't support retroactive leave events. When you enter a leave in the past, Workday doesn't cascade leave if the date that you want to cascade is in the past.

c) In the **Step** column, select **Business Process** > **Maintain Step Delay** from the related actions menu.
d) For **Delay Is Based On**, select the *Field* option, and then select a field.

   For cascading leave, Workday recommends that you select *Last Date of Entitlement or Estimated Last Day or Actual Return Date*.

   Workday automatically adds a condition for the step delay, that you can view, but not change, in the **If** column of the **Business Process Steps** grid.
e) To enable Workday to recalculate the step delay for corrected leaves, Workday recommends that you select the **Recalculate Delay upon Correct** check box.

4. Consider which user to configure as the processing user for delayed steps.

Note: To calculate the entitlement correctly, the processing user needs access to all of the fields in the calculation. This step isn't necessary when all fields in the calculation are secured to *Public Reporting Items* in the Tenant Non-Configurable functional area. Workday uses the processing user that you select for all delay steps. Before you select this user, consider the impact of this decision on delay steps on other business processes.

a) Access the **Edit Tenant Setup - Business Processes** task.
b) Select a user from the **User for Business Process Time Delay Background Processes** prompt.

   When you don't specify a user, Workday uses the scheduler as the initiating user. The scheduler only has access to the *Public Reporting Items* domain. If you use a field in the entitlement calculation that's secured to a restricted domain, the scheduler can't resolve it, resulting in an incorrect estimated last day of leave.

Result

Workday automatically generates requests to return employees from leave, regardless of the leave type, when they meet the conditions specified by the delay step. It also generates a request for the next leave type for employees returning from *Short-Term Leave* or *Long-Term Leave*.

Related Information
Concepts

Concept: Cascading Leave on page 2364

Tasks

Create Leave Types on page 2356

Example: Set Up Supplemental Sick Leave at Reducing Rates of Pay

This example illustrates how to configure cascading leave of absence to streamline moving workers from paid to supplemental and unpaid leave.

Context

When workers go out on leave of absence, such as long-term sick leave, your company offers them paid or supplemental sick leave entitlements at reducing rates of pay. When they use up all of their paid leave, Workday cascades them to unpaid leave. You want to set up cascading leave to streamline the process, using a rolling forward balance calendar.

Prerequisites

Define these FMLA leave types, making all either position-based or worker-based:

- *100% Supplemental Sick Leave*
- *60% Supplemental Sick Leave*
- *Unpaid Sick Leave*

Security: These domains in the System functional area:

- *Custom Field Management*
- *Business Process Administration*
- *Manage: Business Process Definitions*
- *Set Up: Tenant Setup - BP and Notifications*

Set Up: Leave of Absence domain in the Time Off and Leave functional area.

Steps

1. Access the **Create Calculated Field** task.

   Create a true/false condition that determines whether the worker has more than 5 years of service.

   a) Enter these values:

Field	Value
Field Name	*Years of Service > 5 years*
Business Object	*Worker*
Function	*True/False Condition*

   b) Click **OK**.

   c) Select these values on the **Calculation** tab:

Field	Value
And/Or	*And*
Field	*Length of Service in Months from Benefits Service Date*
Operator	*greater than*
Comparison Type	*Value specified in this filter*
Comparison Value	*60*

   d) Click **OK**.

2. Click **Create Another Calculation**.

   Create a calculated field that evaluates the supplemental sick leave entitlement. If the *Years of Service > 5 years* condition is true, the supplemental sick leave entitlement for the worker is 10 days.

   a) Enter these values:

Field	Value
Field Name	*Supplemental Sick Entitlement*
Business Object	*Worker*
Function	*Evaluate Expression*

   b) Click **OK**.

   c) Select these values on the **Calculation** tab.

Field	Value
Field Type	*Numeric*
Default Value	Zero

   d) Add a row with these values:

Field	Value
Condition	*Years of Service > 5 years*
Return Value If Condition Is True	*10*

   e) Click **OK** and **Done**.

3. Set up the next leave to cascade to when workers use up all of their entitlement for the current leave.

   a) Access the **Edit Leave Type** task.

   b) Select the leave type. Example: *100% Supplemental Sick Leave*.

   c) On the **Balance/Leave Taken** tab, select the **Track Balance** check box.

   d) Configure the leave type to use a rolling-forward balance calendar. Enter these values:

Field	Value
Balance Start Date	*Leave Balance Calendar - Effective Date (First Day of Leave)*
Balance Calendar End Date	*Leave Balance Calendar - Effective Date (First Day of Leave) plus 12 months*
Unit of Time	*Days*
Calendar Display	*Do not show balance*

   e) In the **Leave Entitlement** section, for **Entitlement Units**, select the *Calculation* option, and select the new *Supplemental Sick Entitlement* calculated field.

   f) In the **Leave Taken** section, for **Days to Include**, select *All Days*.

   g) On the **Cascading Leave** tab, select *60% Supplemental Sick Leave* from the **Next Leave Type** prompt.

   h) Repeat Steps 3a to 3f to configure the *60% Supplemental Sick Leave* type in the same way.

   i) On the **Cascading Leave** tab, select *Unpaid Sick Leave* from the **Next Leave Type** prompt.

   j) Click **OK**.

4. Edit the *Request Leave of Absence* business process. Add the *Automated Leave Processing* service step after the completion step.
   a) From the related actions menu, select **Business Process** > **Edit Definition**.
   b) Add a new row with these values:

Field	**Value**
Order	*c*
Type	*Service*
Specify	*Automated Leave Processing*

   c) Click **OK**.
5. Add a step delay on the *Automated Leave Processing* service step to determine when automated leave processing should:
   - Return workers from their current leave.
   - Initiate the *Request Leave of Absence* business process to cascade them to the next leave.

   a) From the related actions menu of the step, select **Business Process** > **Maintain Step Delay**, and click **OK**.
   b) For **Delay Is Based On**, select the *Field* option, and then select *Last Date of Entitlement or Estimated Last Day or Actual Return Date*.
   c) To enable Workday to recalculate the step delay for corrected leaves, select the **Recalculate Delay upon Correct** check box.
   d) Click **OK**.
6. Configure the user to use as the processing user for delayed steps.
   a) Access the **Edit Tenant Setup - Business Processes** task.
   b) Select a user from the **User for Business Process Time Delay Background Processes** prompt.

   Note: To calculate the entitlement correctly, the processing user needs access to all of the fields in the calculation. This step isn't necessary when all fields in the calculation are secured to *Public Reporting Items* in the Tenant Non-Configurable functional area. Because the *Length of Service in Months from Benefits Service Date* field is secured to *Worker Data: Current Staffing Information* in the Staffing functional area, you need to select a processing user who has access to this domain. Workday uses the processing user that you select for all delay steps. Before you select this user, consider the impact of this decision on delay steps on other business processes.
7. Test the configuration.
   a) Access the **Place Worker on Leave** task.
   b) Select a worker.
   c) Enter these values:

Field	**Value**
First Day of Leave	*2022-04-01*
Estimated Last Day of Leave	*2022-04-15*
Leave Type	*100% Supplemental Sick Leave*

Field	Value
	Note that the worker has a 10-day entitlement.

d) Click **Submit.**
e) In the pop-up window, click **View Details**.
f) Expand the **Details and Process** section. On the **Process** tab, verify that Workday delays the *Service: Automated Leave Processing* step by 10 days, based on the worker's years of service, until 2022-04-10.
g) Access the **Job Profile** for the worker after 2022-04-10.
h) On the **Worker History** report, verify that:

- The automated Leave Return request event for the worker occurs on the correct date.
- Workday places the worker on a new leave the next day.

i) Drill into the original leave request event. On the **Process** tab, verify that the *Service: Automated Leave Processing* step completed on the expected date.
j) Drill into the automated Leave Return request. On the **Details** tab, verify that Workday returned the worker from supplemental sick leave on the correct date (2022-04-10).
k) Drill into the cascaded Leave Request Event. On the **Details** tab, verify that Workday cascaded the worker to the correct:

- **Leave Type:** Example: *60% Supplemental Sick Leave*.
- **First Day of Leave:** Example: 2022-04-11.
- **Estimated Last Day of Leave:** Example: 2022-04-20, based on the remaining units that the worker has for *60% Supplemental Sick Leave*.

Related Information
Concepts
Concept: Cascading Leave on page 2364

Example: Set Up Parental Leave

Context

In your country, couples can take a total 480 days of paid leave per child, with each parent entitled to 240 days of leave. Parents of multiples, such as twins, can take an additional 180 days per additional child. Single parents can use the entire amount granted to couples.

Parents can take an unlimited number of days of parental leave in a year, as long as they don't exceed the total entitlement. Parents can take parental leave anytime from 60 days before the child's delivery date up until the child's eighth birthday. They can divide up their entitlement into multiple leave requests.

You need to create a leave type that:

- Grants parents the amount of leave appropriate to their situation.
- Has a balance calendar that begins on the first day of leave and ends on the child's eighth birthday.
- Can support multiple leave request events.
- Validates that the first day of leave isn't more than 60 days before the birth date (expected due date).

Prerequisites

Security:

- *Custom Field Management* domain in System functional area.
- *Set Up: Leave of Absence* domain in Time Off and Leave functional area.

Steps

1. Create a condition for parent employees who aren't single.
   a) Access the **Create Calculated Field** task.
   b) As you complete the task, consider:

Field	**Value**
Field Name	*Single Parent is False*
Business Object	*Leave Request Event*
Function	*True/False Condition*
Field	*Single Parent Indicator*
Operator	*equal to*
Comparison Type	*Value specified in this filter*
Comparison Value	Leave unchecked.

   c) On the **Additional Info** tab, select the *Leave of Absence* **Category**.
2. Create a condition for employees who are single parents.
   a) Access the **Create Calculated Field** task.
   b) As you complete the task, consider:

Field	**Value**
Field Name	*Single Parent is True*
Business Object	*Leave Request Event*
Function	*True/False Condition*
Field	*Single Parent Indicator*
Operator	*equal to*
Comparison Type	*Value specified in this filter*
Comparison Value	Check this box.

   c) On the **Additional Info** tab, select the *Leave of Absence* category.
3. Create a numeric constant that returns 180.
   a) Access the **Create Calculated Field** task.
   b) As you complete the task, consider:

Field	**Value**
Field Name	*180*
Business Object	*Leave Request Event*
Function	*Numeric Constant*
Numeric Constant	*180*

   c) On the **Additional Info** tab, select the *Leave of Absence* **Category**.

4. Create an arithmetic calculation that calculates the entitlement per additional child, multiplied by the number of additional children.

a) Access the **Create Calculated Field** task.

b) As you complete the task, consider:

Field	**Value**
Field Name	*180 * (Number of babies -1)*
Business Object	*Leave Request Event*
Function	*Arithmetic Calculation*

c) Define the **Arithmetic Expression**:

(	**Field**	**)**	**Operator**
	180		** (Multiply)*
(	*Number of Babies/ Adopted Children*		*- (Subtract)*
	1	*)*	

d) On the **Additional Info** tab, select the *Leave of Absence* **Category**.

5. Create a numeric constant that returns 240.

a) Access the **Create Calculated Field** task.

b) As you complete the task, consider:

Field	**Value**
Field Name	*240*
Business Object	*Leave Request Event*
Function	*Numeric Constant*
Numeric Constant	*240*

c) On the **Additional Info** tab, select the *Leave of Absence* **Category**.

6. Create a numeric constant that returns 480.

a) Access the **Create Calculated Field** task.

b) As you complete the task, consider:

Field	**Value**
Field Name	*480*
Business Object	*Leave Request Event*
Function	*Numeric Constant*
Numeric Constant	*480*

c) On the **Additional Info** tab, select the *Leave of Absence* **Category**.

7. Create an arithmetic calculation that calculates the total entitlement for a parent employee who isn't single.

a) Access the **Create Calculated Field** task.

b) As you complete the task, consider:

Field	Value
Field Name	*240 + (180 * (Number of babies - 1))*
Business Object	*Leave Request Event*
Function	*Arithmetic Calculation*

c) Define the **Arithmetic Expression**:

Field	Operator
240	*+ (Add)*
*180 * (Number of babies - 1)*	

d) On the **Additional Info** tab, select the *Leave of Absence* **Category**.

8. Create an arithmetic calculation that calculates the total entitlement for an employee who is a single parent.

a) Access the **Create Calculated Field** task.

b) As you complete the task, consider:

Field	Value
Field Name	*480 + (180 * (Number of babies - 1))*
Business Object	*Leave Request Event*
Function	*Arithmetic Calculation*

c) Define the **Arithmetic Expression**:

Field	Operator
480	*+ (Add)*
*180 * (Number of babies - 1)*	

d) On the **Additional Info** tab, select the *Leave of Absence* **Category**.

9. Create a calculated field that returns an employee's total entitlement based on their parental status (single or not single).

a) Access the **Create Calculated Field** task.

b) As you complete the task, consider:

Field	Value
Field Name	*Parental Entitlement*
Business Object	*Leave Request Event*
Function	*Evaluate Expression*
Field Type	*Numeric*

Field	Value
Default Value	*0*

c) Enter these conditions and values:

Condition	Return Value if Condition is True
Single Parent is False	*240 + (180 * (Number of babies - 1))*
Single Parent is True	*480 + (180 * (Number of babies - 1))*

d) On the **Additional Info** tab, select the *Leave of Absence* **Category**.

10. Create a calculated field that calculates the end date for the balance calendar.

a) Access the **Create Calculated Field** task.

b) As you complete the task, consider:

Field	Value
Field Name	*Child's Birth Date + 8 Years*
Business Object	*Leave Request Event*
Function	*Increment or Decrement Date*
Date Field	*Child's Birth Date*
Years to Add or Subtract	*8*
Days to Add or Subtract	*-1*
Return Blank Date on Error	Check this box

c) On the **Additional Info** tab, select the *Leave of Absence* **Category**.

11. Configure the leave type.

a) Access the **Create Leave Type** task.

b) Select the **Country/Country Region** to which this leave type applies.

c) On the **Validations/Supporting Data** tab, add a leave of absence rule that the start date occurs not more than 60 days before the child's expected due date.

d) On the **Balance/Leave Taken** tab:

Field	Option
Track Balance	Select this check box.
Balance Calendar Start Date	*Leave Balance Calendar - Effective Date (First Day of Leave)*
Balance Calendar End Date	*Child's Birth Date + 8 Years*
Unit of Time	*Days*
Entitlement per Event	Select this check box
Entitlement Units (calculation)	*Parental Entitlement*

e) On the **Additional Fields** tab, add these additional fields:

- *Child's Birth Date* (make this field required).
- *Number of Babies/Adopted Children* (make this field required).
- *Single Parent Indicator*.

Result

Employees enter this information when they request parental leave:

- Child's birth date.
- Number of children.
- Whether the employee is a single parent.

Workday uses this information to calculate:

- Their total entitlement based on whether they're a single parent and the number of children in this event.
- The start and end dates of their balance calendar based on the child's birth date.

Related Information
Tasks

Create Leave Types on page 2356

Create Leave of Absence Rules on page 2354

Example: Add Leave Entitlement Overrides to Leave Requests

This example illustrates how to:

- Add the **Leave Entitlement Override** field as an additional field on a leave type to enable managers or workers to override the worker's original leave entitlement.
- Set a default value for the leave entitlement override calculation in Workday when workers or managers don't enter a value on the leave request.

Context

You want to configure your *Compassionate Care* leave type so that workers can specify a leave entitlement override when they request leave of absence for this leave type. Example: Your organization might enable workers to share entitlements with partners who don't work in the organization. When workers don't specify a leave entitlement override, you want to specify a default value of 90 units.

Prerequisites

Create the *Compassionate Care* leave type for the *Family Leave* leave family.

Steps

1. Add the **Leave Entitlement Override** field to the leave type.
   a) Access the **Edit Leave Type** task.
   b) Select *Leave Family> Family Leave> Compassionate Care* from the **Leave Type** prompt.
   c) On the **Additional Fields** tab, add a row with the *Leave Entitlement Override* field.
   d) Click **OK**.
2. Create a calculated field that uses the **Leave Entitlement Override** value in the leave request to calculate the leave entitlement.
   a) Access the **Create Calculated Field** task.
   b) As you complete the task, consider:

Field	Value
Field Name	*Leave Entitlement Override >0*
Business Object	*Leave Request Event*

Field	Value
Function	*True/False Condition*

c) On the **Calculation** tab, create the condition rule:

And/Or	Field	Operator	Comparison Type	Comparison Value
And	*Leave Entitlement Override*	*greater than*	*Value specified in this filter*	*0*

d) Click **OK**.

3. Create a calculated field that uses a default value when the leave entitlement override isn't greater than zero.

a) Access the **Create Calculated Field** task.

b) As you complete the task, consider:

Field	Value
Field Name	*Leave Override if > 0 Else 90*
Business Object	*Leave Request Event*
Function	*Evaluate Expression*

c) On the **Calculation** tab, enter these values:

Field	Value
Field Type	*Numeric*
Default Value	*90*
Condition	*Leave Entitlement Override > 0*
Return Value If Condition is True	*Leave Entitlement Override*

d) Click **OK** and **Done**.

4. Change the leave type to use the new calculations.

a) Access the **Edit Leave Type** task.

b) Select *Leave Family> Family Leave> Compassionate Care* from the **Leave Type** prompt.

c) Click **OK**.

d) On the **Balance/Leave Taken** tab, in the **Leave Entitlement** section, select *Leave Override if > 0 Else 90* from the **Entitlement Units (Calculation)** prompt.

e) Click **OK** and **Done**.

Result

Workers can enter the leave entitlement override as additional information when they request leave of absence for this leave type. Workday uses this information to calculate the total leave entitlement or uses the default value when workers leave the override field blank.

Related Information

Reference

Reference: Additional Fields for Leave Types on page 2370

Managing Leaves of Absence

Place Workers on Leave

Prerequisites

- Set up a leave of absence.
- Configure the *Request Leave of Absence* business process and security policy in Time Off and Leave functional area.

Context

Place a worker on leave when they’re unable to access Workday to enter their own request. Example: Long-term sick leave.

Steps

1. Access the **Place Worker on Leave** task.
2. Enter the leave dates:

Field	Description
Last Day of Work	Workday automatically populates this field with the date before the **First Day of Absence**.
First Day of Leave/Absence	The worker's business site location on the day controls the available **Leave Type** values.
Estimated Last Day of Leave/Absence	Workday considers a worker off leave the day after this date. **Note:** The total length of the leave of absence must be less than 50 years.

3. Select the **Leave Type** to identify why the worker is taking a leave of absence.
4. If applicable, select the **Position** to which this leave applies.
    - If you select position-based leave, the **Position** prompt becomes enabled. When a worker has only 1 position that is eligible for the leave, Workday displays that position.
    - If the worker is taking a leave of absence for all positions, enter a separate request for each position.
    - A plus sign (+) after the name of a position identifies it as a secondary position.
5. (Optional) If applicable, select a previous event of this leave type in the **Links back to Prior Event** field.

    This field is available when:

    - The leave type has entitlements per event.
    - This leave event is in the same balance period as a previous event of the same leave type.

    Linking events enables them to draw from the same entitlement balance. When workers have multiple eligible prior leave of absence events, you can select which event to link to. Intermittent time off is an exception. Workday draws from the balances of eligible events in chronological order, depleting the balance for the first event, before moving on to the next.
6. When the location of the worker or position is Canada, enter the **Last Date for Which Paid**.

    Workday automatically populates this field with the value of **Last Day of Work**.

7. Attach any documentation required for the leave.

   You can attach supporting documents when:

   - Reviewing and correcting requests.
   - Returning a worker from leave.
8. Click **Submit** or **Save for Later**.

   If you click **Save for Later**, you can access the request from **My Tasks** and click **Revise**.

   When you configure a leave type for balance tracking, requests in a *Save for Later* status don't reduce the available entitlement balance.

Result

When you submit the request, Workday routes it to the **My Tasks** of the appropriate reviewers. Reviewers can approve, deny, or return the request for revision. They can also change the leave return date and include attachments.

If the leave type inactivates the worker, Workday automatically sets the worker's status to inactive upon approval of the request. To correct or rescind the event, select it as a related action on the leave request from the **View Worker History** task.

Next Steps

To view leaves of absence, use these reports:

- **Workers on Leave**.
- **Leave Results for Worker (includes leave balance)**.
- **Leave Results for Organization (includes leave balances)**.
- **Workers Returning from Leave**.
- **Maintain Worker Documents**.

Related Information

Tasks

Create Work Schedule Calendars

Reference

Reference: Leave Impacts on page 2373

Correct Leave of Absence Requests

Prerequisites

- The leave request action has a status of *Successfully Completed* in the worker's worker history.
- You belong to an initiating security group for the *Request Leave of Absence* business process.

Context

Correct an approved leave of absence request. If a return request has already been submitted, rescind the leave return action first.

Steps

1. Locate the worker, and select the related action: **Worker History** > **View Worker History**.
2. From the related actions menu of the leave request, select **Business Process** > **Correct**.

   You can also **Rescind** the business process.

3. Make the corrections.

   Complete any required fields added or optional fields marked as required for the leave type after the request is approved.

   Note: Workday doesn't apply validation rules to corrections.

Result

Corrections overwrite the existing request and don't require approval.

As part of the delivered business process, corrections trigger a notification to the Payroll Interface Partner of the worker's organization whenever the leave type has a payroll effect. This way, the Payroll Interface Partner can review the payroll interface data extract for any impact on payroll.

Return Workers from Leave

Context

Record a worker's return from a leave of absence. You can record a worker's return from multiple leaves at the same time, if:

- Your Workday tenant is configured for multiple jobs, and
- All the leave types are worker-based or for the same position.

You can enable workers to use the self-service **Request Return from Leave** task to enter their own requests to return from leave. Modify the *Request Return from Leave of Absence* business process by adding the *Employee as Self* and *Contingent Worker as Self* security groups to the initiating action of the business process.

To return a group of workers from a leave of absence, you can import data into the *Request Return from Leave of Absence* business process from a spreadsheet using Workday's Enterprise Interface Builder (EIB).

Workday Payroll doesn't support retro-pay calculation for multiple returns from leave in a single event. To return workers from multiple leave request events, select only 1 leave request event at a time. Workday creates a separate leave return event for each leave request event.

If a worker hasn’t returned from leave, and there isn’t a return from leave event for that worker, the Absence Calendar displays the leave of absence request up to the current date, beyond the estimated last day of leave.

Steps

1. Access the **Return Worker from Leave** task.
2. Select the **Position**, if applicable.

   This field displays only if the worker is out on at least 1 position-based leave. Entry is optional if the worker is also on a worker-based leave.

   To record the return from a worker-based leave, don't select a position.
3. (Optional) Enter the **First Day Back at Work.**
4. If the worker is on more than 1 leave, clear the **Select** check box for any leaves the worker is not yet returning from.
5. Enter the **Actual Last Day of Leave**.
6. To attach documentation required for the return from leave, expand the **Supporting Documents** section.

Result

If the *Request Return from Leave of Absence* business process includes an approval step, Workday routes the request to the Inbox of the next reviewer. Reviewers can approve, deny, or return the request for revision. They can also add attachments.

Workday sets the worker's status to active on the date following the **Actual Last Day of Leave**, and automatically sends any notifications that you have set up as part of the *Request Return from Leave of Absence* business process for the worker's organization.

Next Steps

To view information about employees returning from leaves of absence, use these reports:

- **Workers Returning from Leave**
- **Workers Returned from Leave**

Correct Return from Leave of Absence Requests

Prerequisites

- The leave return action has a status of *Successfully Completed* in the worker's worker history.
- You belong to an initiating security group for the *Request Return from Leave of Absence business process definition*.

Context

Correct a return from leave of absence request that has already been approved.

Steps

1. Locate the worker, and select the related action: **Worker History** > **View Worker History**.
2. From the related actions menu of the leave return business process, select **Business Process** > **Correct**.

   You can also **Rescind** the business process.
3. Make the corrections.
   The same fields are available for the correction as the initial request.
   Workday validates that the **Actual Last Day of Leave** is before the **First Day Back at Work**.

Result

Corrections overwrite the existing request and don't require approval.

As part of the delivered business process, corrections trigger a notification to the Payroll Interface Partner of the worker's organization whenever the leave type has a payroll effect. This way, the Payroll Interface Partner can review the payroll interface data extract for any impact on payroll.

Related Information
Tasks

Edit Business Processes

Concept: Importing Leave of Absence Events

You can load large volumes of leave of absence events into Workday Absence using Workday Enterprise Interface Builder (EIB) and SOAP UI for these web services:

- *Import Request Leave of Absence*
- *Import Request Return From Leave of Absence*

You can use these web services to:

- Load leave events in Workday from a third-party tool.

- Migrate validated leave events into Workday.
- Load batches of leave events in bulk.
- Correct multiple leave events for multiple workers.

To avoid introducing risks when loading request leave of absence events, Workday recommends that you don't load these events in the same file:

- Events linked to prior events.
- New events and corrections.

Business Processes

Importing a batch of leave of absence events launches these respective business processes:

Business Process	Notes
Request Leave of Absence	You can add users to the security groups of the *Import Request Leave of Absence Events* initiating action to enable them to load request leave of absence events in batches.
Request Return from Leave of Absence	You can add users to the security groups of the *Import Request Return from Leave of Absence Events* initiating action to enable them to load request return from leave of absence events in batches.

When you migrate large volumes of leave events during deployment, Workday recommends that your business processes include either:

- Only the *Initiation* step.
- The *Completion* step as the last step.

When you load leave events using the import web services, Workday automatically completes the respective business process, then runs subprocesses.

Tips for Entering Data in the EIB Spreadsheet

As you complete the EIB template, consider these fields:

Field	Notes
Header Key	Determines the batch for a leave event. Use the same header key to group all events in a batch. Example: To load events in 2 batches, use *1* for the first 500 rows and *2* for the next 1,000 rows.
Line Key	An incremental value for each row within a header key batch. Example: Use *1* for the first row, *2* for the second row, *3* for the third row, and so on. Restart the numbering at 1 for each batch.
Request Leave of Absence ID	Workday assigns a value if you don't provide one. This field is available only on the Import Request Leave of Absence Events EIB spreadsheet.

Field	Notes
Correction	Enter *Y* or *N* to indicate that you're correcting an existing leave event.
Leave of Absence Type	This field is available only on the Import Request Leave of Absence Events EIB spreadsheet.
First Day of Leave	The first date of a worker's leave. Example: *2020-03-25*. This field is available only on the Import Request Leave of Absence Events spreadsheet.
Estimated Last Day of Leave	The estimated last date of a worker's leave. Example: *2020-04-22*. This field is available only on the Import Request Leave of Absence Events spreadsheet.
Row ID	A unique numerical value for each row. This field is available only on the Import Request Return from Leave of Absence Events spreadsheet.
Request Leave of Absence	To return a worker from leave, enter the unique **Request Leave of Absence ID** of the request leave of absence event. This field is available only on the Import Request Return from Leave of Absence Events spreadsheet.
First Day of Work	The date a worker returns to work. Example: *2020-04-24* This field is available only on the Import Request Return from Leave of Absence Events spreadsheet.
Actual Last Day of Leave	The actual last date of a worker's leave. Example: *2020-04-23* This field is available only on the Import Request Return from Leave of Absence Events spreadsheet.

Validating Leave of Absence Events

When you load events using the import web services, Workday validates each leave event.

The import web services ignore validation rules that you've configured on:

- Leave Type.
- Business process.

Once the web services complete importing leave events, you can view the validations for leave events in Workday.

Related Information
Tasks

Set Up Inbound EIB

Reference

The Next Level: Using Absence to Record Furloughed Leave

Concept: Identifying Workers on Leave

When a worker is on leave, Workday displays an *(On Leave)* notation after the worker's name. This depends on the **On Leave Status Visibility Type** setting on the leave type. You can configure the leave type to display the *(On Leave)* status:

- Always.
- Never.
- Only to those who are authorized to see the worker's leave of absence. When you select the *Only Show to Users Secured to Leave of Absence Event* option for **On Leave Status Visibility Type**, anyone with view permission on the *Worker Data: Leave of Absence* domain can view the *(On Leave)* status for the worker.

Multiple Job Visibility

If your leave types display the *(On Leave)* status and your tenant has multiple jobs set up, you can display these notations when a worker goes on leave:

- *(On Leave)* displays after the worker's name and after every position if the worker is on a:
  - Worker-based leave.
  - Position-based leave for every position. (A plus sign displays (+) after a secondary position's name.)
- *(On Leave)* displays only after the positions that are on leave, not the worker's name, if the worker:
  - Is on a position-based leave for a subset of his positions, and
  - Isn't on a worker-based leave.

Note: *Only Show to Users Secured to Leave of Absence Event* displays notations for positions with leave events that managers can view. They see the *(On Leave)* notation after the worker's name only if they have permission to view leave events for all of the worker's positions.

Example: Worker-Based and Position-Based Leave Visibility

Jim has 3 positions: professor, researcher, and physician. All of the leave types he's eligible for are set to display the *(On Leave)* status.

- If Jim takes a worker-based leave of absence *(On Leave)* displays after his name and after each of his 3 positions.
- If he takes a position-based leave from his professor position only *(On Leave)* displays after his professor position only.
- If Jim takes a position-based leave for all 3 of his positions *(On Leave)* displays after his name and after each position.

Concurrent Leave Visibility

If a worker is on 2 or more leaves concurrently, Workday uses the least restrictive *On Leave Status Visibility Type* setting to determine whether to display the *(On Leave)* status. Workday re-evaluates the status visibility whenever you start or end a leave that overlaps with another.

Leave A Setting	Leave B Setting	Result
Always Show	*Always Show*	*Always Show*
Always Show	*Never Show*	*Always Show*
Always Show	*Only Show to Users Secured to Leave of Absence Event*	*Always Show*
Never Show	*Never Show*	*Never Show*

Leave A Setting	**Leave B Setting**	**Result**
Never Show	*Only Show to Users Secured to Leave of Absence Event*	*Only Show to Users Secured to Leave of Absence Event*
Only Show to Users Secured to Leave of Absence Event	*Only Show to Users Secured to Leave of Absence Event*	*Only Show to Users Secured to Leave of Absence Event*

Reports

These reports display workers and positions on leave:

- **Workers on Leave**
- **Workers Returning from Leave**

Related Information
Tasks

Create Leave Types on page 2356

Reference

The Next Level: Using Absence to Record Furloughed Leave

Absence Event Tracking

Steps: Manage Absence Cases

Context

You can track and assist workers who are on long-term time offs and leaves of absence. You can track their progress as they reach milestones and checkpoints in their path to rejoining the workforce. You can define a checklist of various reintegration activities, such as meetings and compensation changes, and the timeline over which they occur. Many countries have statutory requirements for the reintegration process. Example: you can track the process of reintegration of workers who are returning after a long-term illness.

Steps

1. Configure the *Absence Case Event* business process.

   Define the steps in the business process definition that are part of the worker reintegration process.

   See Steps: Configure Business Process Definitions.
2. (Optional) Edit Business Processes.

   Add the *Automated Absence Case Creation* service step after the completion step on these business processes:

   - *Request Leave*
   - *Request Time Off*

   The service step automatically initiates an absence case when a worker's leave of absence or time off meets the parameters configured for an absence case group.
3. (Optional) Maintain Step Delay.

   Use the **Processing Date for Automatic Absence Case Creation** report field to add a step delay to the *Automated Absence Case Creation* service step. The step delay prevents the service step from initiating an absence case until the worker meets the parameters of their absence case group.

   Anna's absence case group initiates absence cases after 4 weeks of qualifying absences. Anna requests a qualifying leave of absence today that is 10 weeks long. With the step delay, Workday doesn’t initiate an absence case until 4 weeks from today. Without the step delay, Workday initiates an absence case as soon as her manager approves her request.

4. Create Absence Case Groups on page 2405.
5. Initiate Absence Cases on page 2407.

Result

You can use the **Manage Absence Cases** report to create, view, and close absence cases for a worker.

Related Information
Reference
The Next Level: Absence Occurrences and Absence Case Management

Create Absence Case Groups

Prerequisites

Security:

- *Set Up: Leave of Absence* domain in the Time Off and Leave functional area.
- *Set Up: Time Off* domain in the Time Off and Leave functional area.

Context

Absence case groups define the conditions that automatically initiate absence cases for workers. Groups are based on a set number of days of absence in a defined period.

Note: Absence case groups also apply when creating cases manually.

Regulatory requirements often define the conditions.

Example: Create an absence case group that aligns with the requirements of the Gatekeeper Improvement Act (Wet Verbetering Poortwachter) for workers in the Netherlands.

Steps

1. Access the **Create Absence Case Group** task.
2. Enter an **Absence Case Group Name**.
3. As you complete the task, consider:

Option	Description
Inactive	(Optional) Inactivate the absence case group. Workday doesn't automatically create absence cases, and you can't manually create absence cases, for inactive case groups.
Time Period Considered for Case (Days)	Enter the number of consecutive days over which to evaluate qualifying absences. The time period begins on the first day of any given qualifying absence.
Minimum Number of Qualifying Days	Enter the minimum number of days of qualifying absences in the time period required to initiate an absence case.
Minimum Number of Days Between First and Last Qualifying Days	Example: If the last qualifying day must be 27 days after the first qualifying day in the time period to initiate an absence case, enter 26.
Qualifying Leaves and Time Offs	Select from the leaves and time offs that aren't in use by other active absence case groups.

4. (Optional) In the **Absence Case Outcomes** grid, add a row for each possible outcome.

   You can select from this field when you create, correct, or close an absence case. Case outcome enables you to create a report of closed cases. Example: The case closes because the worker successfully reintegrates after a prolonged period of absence.
5. (Optional) On the **Supporting Data** tab, select **Show Workability Percentage**.

   This option enables you to enter a workability percentage for the absence cases in this group.

Result

If you've added the *Automated Absence Case Creation* service step to the *Request Leave of Absence* and *Request Time Off* business processes, Workday creates an absence case for a worker when their leave or time off event meets the parameters of the absence case group. You can also manually initiate absence cases for the absence case group.

Example

You've configured your business processes to initiate absence cases and you've created an absence case group with these parameters:

Parameter	Value
Time Period Considered for Case	28
Minimum Number of Qualifying Days	2
Minimum Number of Days Between First and Last Qualifying Days	26

Several of your workers are on various leaves and time offs that qualify for the absence case group. Whether Workday initiates absence cases depends on the details of their absences.

Hans

- Hans is absent on these dates: July 1 - August 15.
- Time period considered for case: July 1 - July 28.
- On July 2, Hans meets the minimum number of qualifying days. The gap between the first and last qualifying days (July 1 and July 2) is zero days. Workday doesn't initiate an absence case.
- On July 28, the gap between the first and last qualifying days grows to 26. The gap matches the parameters for the absence case group. Workday initiates an absence case.

Edgar

- Edgar is absent on these dates:
  - July 1
  - July 27 - July 28
- Time period considered for case: July 1 - July 28.
- On July 27, Edgar meets the minimum number of qualifying days. The gap between the first and last qualifying days (July 1 and July 27) is 25 days. Workday doesn't initiate an absence case.
- On July 28, the gap between the first and last qualifying days grows to 26. The gap matches

	the parameters for the absence case group. Workday initiates an absence case.

Lotte	• Lotte is absent on these dates:
	  • July 1
	  • July 10 - July 15
	  • July 27 - July 28
	• Time period considered for case: July 1 - July 28.
	• On July 10, Lotte meets the minimum number of qualifying days. The gap between the first and last qualifying day is 8 days. Workday doesn't initiate an absence case.
	• On July 28, the gap between the first and last qualifying days grows to 26. The gap matches the parameters for the absence case group. Workday initiates an absence case.

Gerard	• Gerard is absent on these dates:
	  • July 1
	  • July 27 - July 28, for a time off that doesn't qualify for the absence case group.
	• Time period considered for case: July 1 - July 28.
	• Workday doesn't initiate an absence case because Gerard has only 1 qualifying day in the time period.

Jan	• Jan is absent on these dates: July 10 - July 15. • Time period considered for case: July 10 - August 6. • Workday doesn't initiate an absence case because the gap between the first and last qualifying days is 4 days. • If Jan has another qualifying absence on August 6, Workday initiates an absence case because the gap is 26 days.

Initiate Absence Cases

Prerequisites

- The worker must be on a qualifying leave or time off.
- Configure the *Absence Case Event* business process and security policy in the Time Off and Leave functional area.

Context

You can manually initiate an absence case for a worker if your business process or absence case group configurations don't apply to their situation.

Steps

1. Access the **Create Absence Case** task.

2. Select an **Absence Case Group**.

   You can select active groups for which the worker doesn't already have an absence case event in progress.
3. As you complete the task consider:

Option	Description
Workability Percentage	This field displays if it's configured for the absence case group. The workability percentage describes the amount of work that a worker who is on a part-time leave or time off is able to contribute.
Case Outcome	This field displays if case outcomes exist for the absence case group. You can also add or change the case outcome when you close the absence case. Example: You know the outcome of an absence case and want to keep a record. Select a case outcome to create an absence case retroactively.

4. Link at least 1 qualifying leave event or time off entry to the absence case.

   Add a row for each qualifying leave event or time off entry. Link at least 1 qualifying leave event or time off entry.

Result

Workday initiates an absence case for the worker according to the *Absence Case Event* business process definition.

Next Steps

Access the **Manage Absence Cases** report to create, view, and close absence cases for a worker.

Absence Occurrences

Setup Considerations: Absence Occurrences

You can use this topic to help make decisions when planning your configuration and use of the Absence Occurrences functionality. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Absence occurrences enable you to monitor the:

- Number of times and consecutive days workers are absent during a period.
- Types of absences they take.

Workday automatically creates an occurrence based on leave events and individual time offs. Absence occurrences can be:

- Standard: Include only 1 absence type.

- Custom: Include multiple types.

Business Benefits

Absence occurrences:

- Increase efficiency in your absence reporting as you can view information for all absence types in 1 report.
- Reduce the risk of error in your absence reports by removing the need to count individual time off or leave events.
- Make it easier to control absenteeism and costs as you can identify trends and use the information to manage your resources.

Use Cases

- Prepare local regulatory reporting documents. Example: Your UK offices have Bradford Factor reporting, measuring how many times an absence occurred in a period.
- Group different types of absences together into 1 occurrence. Example: You can create an absence occurrence for a custom absence type to monitor when workers are absent for a block of consecutive days, including public holidays.

Questions to Consider

When setting up absence occurrences, consider:

Questions	Considerations
What absence types do you want to include in your absence occurrence reporting?	You can enable absence occurrences for these absence types: • Time offs. • Leave types. • Absence tables. Workday then includes these types in a standard absence occurrence, which groups consecutive days of the same absence type. You can create a custom absence occurrence to group different absence types in a way that suits your business needs.
What days do you want to base your absence occurrence on?	Workday creates standard absence occurrences based on the days to include setting in your time off plans or leave of absence types. For absence tables, Workday joins all days to include from all tiers. You can create custom absence occurrences that define which days to include. This configuration overrides the setting in each of the absence types that you include.
How far back do you want to report on absence occurrences?	You can report on absence occurrences for any time period if you convert your existing data when configuring absence occurrences. Ensure that you specify a date as far as back as your reporting requirements.

Recommendations

Workday recommends that you:

- Decide whether you want to enable absence types for absence occurrences after you create them.
- Wait until after major planned data loads in your tenant complete before enabling absence occurrences during implementation. You can create absence occurrences for your existing absence data as of a specific date, for reporting purposes, by running a conversion when you configure absence occurrences. The conversion can take some time. You don't have to run it the first time, but Workday highly recommends you revisit the task and convert your absence data later. Conversion doesn't change the existing absence data.
- Maximize performance by minimizing the as of date, number of workers, and occurrence types when recalculating absence occurrence manually.

Requirements

No impact.

Limitations

Workday automatically recalculates absence occurrences based on certain changes. However, there's a slight delay as the job that detects and recalculates only runs every 4 hours.

When you inactivate a work schedule calendar, Workday doesn't recalculate absence occurrences for workers with direct assignments to the calendar before you inactivated it. You need to recalculate absence occurrences manually for these workers.

Absence occurrences don't support:

- Multiple work schedules per worker.
- Start and end times on time offs. Example: Rachel works Monday to Friday from 8:00 AM to 5:00 PM. If Rachel has time off all day on Monday and from 8:00 AM to 12:00 PM on Tuesday, Workday groups these 2 days into 1 occurrence. However, if Rachel has time off all day on Monday, and time off on Tuesday from 1:00 PM to 5:00 PM, Workday also groups the time off into 1 occurrence. This time off isn't truly consecutive, based on the start and end times of the time offs and Rachel's work schedule.

When maintaining related absence occurrences, Workday links occurrences on specific dates rather than individual time off entries. If an approved time off entry exists on a day that you link, this day remains linked even if someone adds new entries on the same day. Since the original entry's corresponding occurrence is still approved, Workday maintains the link. If the someone corrects the original entry, Workday drops the link because the entry is changed or in progress.

Tenant Setup

Access the **Edit Tenant Setup - HCM** task to enable quantity per occurrence on absence table tiers. See:

- Setup Considerations: Absence Tables on page 2257
- Create Absence Tables on page 2261

Security

Domains	Considerations
Worker Data: Absence Occurrences	Provides view access to the **View Absence Occurrences Detail** report and the **Absence Occurrences for Workers** data source.
Worker Data: Absence Occurrences (Manager View)	Provides managers view access to the **View Absence Occurrences Summary** report and the **Absence Occurrences for Workers** data source.

Domains	Considerations
Worker Data: Related Absence Occurrences domain	Provide access to the **Maintain Related Absence Occurrences** task, enabling you to link and unlink absence occurrences and view linked occurrences.
Set Up: Time Off (General) *Set Up: Leave of Absence*	Provides access to configure absence occurrences and view absence occurrence types.

Business Processes

Business Processes	Considerations
Correct Time Off	Recalculates absence occurrences when a worker corrects their time off. Example: When workers correct their requests by setting the time off quantity to zero, as long as the correction is in progress, the time off is part of the occurrence. After approval, Workday removes the time off from any occurrence that it was previously part of.
Request Leave of Absence *Request Time Off* *Enter Time*	Recalculates absence occurrences when a worker requests a leave of absence or time off.
Request Return from Leave of Absence	Recalculates absence occurrences when workers or managers submit a return from a leave of absence. Example: When workers return from leave, Workday updates the absence occurrence end date to the leave actual end date rather than the estimated return date. Workday considers a worker to be off leave the day after the **Estimated Last Day of Leave/Absence**. Before a worker is returned, Workday uses the estimated last day of leave as the absence occurrence end date. If the estimated last day of leave is 01/05/2024 and the current date is 05/05/2024, if the worker is still on leave, the earlier estimated date impacts reporting where reports are based on the absence occurrence end date.

Reporting

You can use the **Absence Occurrences for Workers** report data source when creating custom reports on absence occurrences. You can also use these data source filters:

- **Absence Occurrences by Organization and Date Range (Approved Only)**
- **Absence Occurrences by Organization and Date Range (Approved and In Progress)**

Reports	Considerations
View Absence Occurrences Detail	Enables absence administrators to view individual occurrences for workers.
View Absence Occurrence Type	Enables absence administrators to view the details of your absence occurrence types.

Reports	Considerations
View Absence Occurrences Summary	Enables managers to view an overview of the number of times workers are absent per absence type.

Integrations

Web Service	Considerations
Get Absence Occurrence Types	Use this web service to view existing absence occurrences types. We recommend you do this before creating a new absence occurrence type.
Put Absence Occurrence Types	Use this web service to enter absence occurrence types, saving time if you want to bulk load absence occurrence types.

Connections and Touchpoints

Features	Considerations
Absence Tables	You can enable absence tables for absence occurrences. Workday automatically flags absence occurrences of this type for recalculation when you change tier configurations in absence tables.
Change Work Schedule	Workday automatically flags absence occurrences for recalculation when either: • You change work schedule assignments for a worker. • Managers or workers make ad hoc work schedule changes in your organization.
Change Job	Workday automatically flags absence occurrences for recalculation when workers change jobs in your organization.
Holiday and Work Schedule Calendars	Workday automatically flags absence occurrences for recalculation when there are changes to your holiday and work schedule calendar events. When you create or edit work schedule calendars and work schedule calendar events (or delete work schedule calendar events), Workday flags absence occurrences for recalculation: • For approved time off or leave, for workers who were directly assigned to the work schedule calendar using the **Assign Work Schedule** task. • For absence occurrence types, including custom types, with days to include settings of *Workdays (Non-Holiday)* or *Workdays (Work hours exceeds Holiday hours)*. • From 31 days before the date of the change onwards.

Features	Considerations
Leave of Absence	You can enable leave of absence types for absence occurrences. Workday automatically flags absence occurrences of this type for recalculation when you change the days to include configuration.
Purge Plans	You can select Absence Occurrences as a purgeable data type and save it in a purge plan for subsequent use when purging person data for terminated workers. You can purge time off or leave data for a worker only if you're also purging absence occurrences.
Time Tracking	Workday recalculates absence occurrences when a worker requests time off through Time Tracking.
Time Off	You can enable time offs for absence occurrences. Workday automatically flags absence occurrences of this type for recalculation if you change the days to include configuration on the time off plan.
Union Membership	Workday automatically flags absence occurrences for recalculation when workers change union membership.

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information
Concepts

Concept: Absence Tiers on page 2266

Concept: Calculating Leave Taken on page 2367

Tasks

Create Time Off Plans That Track Balances on page 2126

Create Time Off Plans That Don't Track Balances on page 2135

Create Work Schedule Calendars

Reference

2020R1 What's New Post: Absence Occurrences

The Next Level: Absence Occurrences and Absence Case Management

Steps: Set Up Absence Occurrences

Prerequisites

- Create absence tables, leave types, and time offs so that you can enable absence occurrences for these types.
- Review setup considerations for absence occurrences.

Context

You can configure absence occurrences to monitor the number of times and consecutive days that workers are absent, helping you to comply with regulatory and company-specific reporting requirements. You can configure absence occurrences for these absence types:

- Absence tables.
- Custom occurrence types that group different absence types.

- Leave types.
- Time offs.

Steps

1. Enable these domain security policies in the Time Off and Leave functional area so that users can access absence occurrence reports:
    - *Worker Data: Absence Occurrences*
    - *Worker Data: Absence Occurrences (Manager View)*

    See Steps: Enable Functional Areas and Security Policies.
2. Edit Domain Security Policies.

    Edit the domain security policy of these domains. Give View and Modify permissions to the security groups that need to access absence occurrence reports.
3. Activate Pending Security Policy Changes.
4. Configure Absence Occurrences on page 2414.
5. (Optional) Access the **View Absence Occurrences Detail** report.

    Perform compliance analysis for an organization or absence type.

    Example: You might need workers to take holidays for a specific number of consecutive days to meet local regulatory requirements. By selecting the **Worker Does Not Have Matching Occurrences** check box, you can see when workers haven't taken any vacation over a specific time period.

    By default, Workday doesn't join pending time off or leave events that require approval in absence occurrences. You can select the **Include Pending Events** check box to join pending events with approved events. Example: A worker's absence data contains 3 consecutive days with a status of approved, approved, and pending for their related time off or leave events. When you:

    - Don't select the check box, Workday returns an absence occurrence of 2 days.
    - Select the check box, Workday returns an absence occurrence of 3 days with a status of In Progress.

Next Steps

Workday runs a background job every 4 hours that automatically detects and recalculates absence occurrences based on certain changes. Example: When work schedules change for workers, their absence occurrences data might change due to changes to their working days.

Note: When you inactivate a work schedule calendar, Workday doesn't recalculate absence occurrences for workers with direct assignments to the calendar before you inactivated it. You need to recalculate absence occurrences manually for these workers.

You can use the **Recalculate Absence Occurrences** task to recalculate manually for a specific worker or occurrence type.

Related Information
Concepts

Setup Considerations: Absence Occurrences on page 2408

Concept: Calculating Leave Taken on page 2367

Reference

2020R1 What's New Post: Absence Occurrences

Configure Absence Occurrences

Prerequisites

Security: These domains in the Time Off and Leave functional area:

- *Set Up: Leave of Absence.*
- *Set Up: Time Off*

Context

You can select which absence tables, time offs, and leave types to enable for absence occurrences. When you enable absence types for absence occurrences, Workday creates standard absence occurrences based on the days to include settings on your time off plans and leave types. For absence tables, Workday joins all days to include from the time off plans on all tiers.

Note: When implementing absence occurrences, wait until after any major planned data loads in your tenant complete before enabling absence occurrences.

Steps

1. Access the **Configure Absence Occurrences** task.

   You can select the:

   - **Select All** check box to enable all instances of each absence type.
   - **Enable for Absence Occurrences** check box beside each absence table, time off, and leave type to enable a specific instance of each absence type.
2. (Optional) Select the **Custom Type** tab to create custom occurrence types for groups of absence types. As you complete this tab, consider:

Option	Description
Absences to Group	Select absence types to group. To group time offs in absence tables that might already have requests against them as individual time offs, select them from the **Time Offs within Absence Tables** prompt category.
Days to Include	When you configure this prompt, Workday determines the days to include when joining a block of absences into a single occurrence and overrides the days to include configuration in each of the absence types in the group. The *Workdays (Non-Holiday)* and *Workdays (Work hours exceed Holiday hours)* options require the setup of holiday and work schedule calendars. These options only apply to the worker’s assigned work schedule calendar and not Workday Scheduling. Workday only includes the days that a worker is scheduled to work, based on their work schedule calendar. However, if a worker agrees to take a shift outside of their normal work schedule calendar, and their manager makes ad-hoc changes to reflect this, selecting the *Workdays (Non-Holiday)* option results in an absence occurrence when the worker is absent. Select the *Configure Days to Include* option to select the **Include Holidays from Holiday Calendar** check box and **Included Days** prompt.

Option	Description
Include Adjacent Public Holidays	Select this check box to extend the absence occurrence by joining public holidays that occur before or after the absence occurrence. Example: You select a **Days to Include** value of *Weekdays (Mon-Fri)*. A worker is absent from Tuesday to Friday and the Monday either before or after, or both, is a public holiday. When you: • Don't select the check box, Workday creates an absence occurrence from Tuesday to Friday. • Select the check box, Workday creates an absence occurrence that starts on the preceding public holiday (Monday) and ends on the following Monday (if also a public holiday), although there's no absence before or after the public holidays.

3. Click **OK** to save your absence type changes.
4. (Optional) Run the absence occurrence conversion so you can report on absence occurrences for specific dates.

   The conversion doesn't change the existing absence data. Instead, it creates absence occurrences for the existing absence data in your tenant. The conversion can take several hours to complete if you have a lot of absence data. Don't access absence occurrence data during an in-progress conversion as you might see some discrepancies.

   Click **Cancel** to run the conversion later, or to run the conversion now:

   a) Enter a **Request Name**.
   b) (Optional) Select a different **As Of** date, if required.

      Note: By default, the **As Of** field value is a year prior to the current date. You can specify a different date from which to convert your workers' existing absence data into occurrences. The conversion might take longer if you specify a date far back in the past. If you don't change the date, Workday converts absence data for the past year.
   c) Select **Include All Enabled** to recalculate absence occurrences for all of the absence types that you enabled previously and the absence types that you just enabled. Otherwise, Workday only calculates absence occurrences for the absence types that you enabled this time.
   d) Click **OK**.

Result

Workday creates an absence occurrence type for each absence type that you enable.

Next Steps

Run the **View Absence Occurrence Type** report to view the types that you enabled. You can remove absence occurrences that you enabled for an absence type in error. Access the **Configure Absence Occurrences** again and clear the **Enable for Absence Occurrences** check box beside the type.

Workday doesn't enable absence occurrences on new absence types automatically. When you create time offs, absence tables, and leave types, consider enabling them for absence occurrences.

Related Information
Tasks
Manage Ad Hoc Work Schedule Changes

Recalculate Absence Occurrences

Prerequisites

Security: These domains in the Time Off and Leave functional area:

- *Set Up: Leave of Absence*
- *Set Up: Time Off*

Context

You can recalculate occurrences manually on an ad hoc basis for worker or configuration changes. Example: When you inactivate a work schedule calendar, Workday doesn't recalculate absence occurrences for workers with direct assignments to the calendar automatically.

Steps

1. Access the **Recalculate Absence Occurrences** task.
2. Select a **Run Frequency**:
   - To recalculate absence occurrences now, select *Run Now*.
   - To schedule the recalculation job to run at a future date and time, in a specific time zone, select *Run Once in the Future*.
3. Enter a **Request Name**

   Workday uses the request name in reports.
4. Enter an **As of Date**.

   Workday recalculates absence occurrences that span or start on the as-of date and later. Example: If you enter today's date, Workday recalculates only occurrences with a date range that spans today or that have a start date of today or later. To ensure that Workday recalculates absence occurrences with issues, enter an as-of date that's on or before the start date of the occurrences.

Concept: Absence Occurrences

Absence occurrences enable you to group absences that occur on either side of nonworking days into 1 consecutive absence. Workday groups such days together even when workers or managers enter them as 1 or more requests.

Workday uses the **Days to Include** value from each absence type to automatically group absence occurrences for:

- Absence tables.
- Time offs.
- Leave types.

You can create custom absence occurrences types that define which days to include. Example: You want to group different absence types into a block of absence to adhere to the mandatory block leave requirement. This configuration overrides the setting in each of the absence types that you include.

You can use absence occurrences to:

- Monitor and report the number of times and consecutive days workers are absent during a period.
- Report workers who have and haven't taken the legally required number of consecutive days of absence during a period. Example: Workers in Switzerland legally require to take 10 consecutive days of vacation in a year.
- Monitor the types of absences workers take.

Global Modern Services (GMS) has an absence plan called *GBR Sickness Days*. Logan McNeil enables the plan for absence occurrences. Logan accesses the **Manage Absence** calendar for Emma Hobson. Emma was sick on Friday, May 1, 2020 and Monday, May 4, 2020. She entered her time off using the *GBR*

Sickness Days absence plan. Because the plan has a **Days to Include** value of *Workdays (Non-Holiday)* and Emma's work schedule indicates that she works Monday to Friday, Workday joins these days. When Logan runs the **View Absence Occurrences Detail** report, Workday displays a single absence occurrence for the days that Emma was sick.

Related Information
Concepts

Setup Considerations: Absence Occurrences on page 2408

Reference

2020R1 What's New Post: Absence Occurrences

Example: Create Condition Rules for Absence Occurrences

Workday enables you to control data entry based on absence occurrences. This example illustrates how to create step condition rules on the *Request Time Off* business process to validate time off requests. However, you can configure the same condition rules for these Absence and Time Tracking business processes, where necessary:

- *Correct Time Off*
- *Enter Time*
- *Request Leave of Absence*
- *Request Time Off*
- *Request Return from Leave of Absence*

Context

Example: You're an Absence administrator for Global Modern Services. You want to create step condition rules to:

- Require attachments such as a medical certificate when workers are absent 7 calendar days or more.
- Prevent workers requesting absence based on the number of occurrences already in the calendar year.
- Require that workers take a block of time off that includes at least 10 consecutive working days during the calendar year.

Prerequisites

Enable absence occurrences for the absence types that you want to validate in the requests such as specific:

- Absence tables.
- Time offs.
- Leave types.
- Custom types.

Security: These domains in the System functional area

- *Business Process Administration*
- *Custom Field Management*
- *Manage: Business Process Definitions*

Steps

1. Access the **Create Calculated Field** task.

   Create a calculated field that checks whether the length of an absence occurrence is greater than or equal to 7.

   a) Enter these values:

Field	Value
Field Name	*Absence Occurrence with Length greater than or equal to 7*
Business Object	*Coordinated Absence Event*
Function	*Lookup Field with Prompts*

   b) Click **OK**.

   c) On the **Calculation** tab, select the *Length of Current Absence Occurrence Matches* report field from the **Source Field** prompt.

   d) In the **Prompts for Source Field** grid, enter these values:

Prompt Field	Value
Length Attribute	*Calendar Days*
Absence Occurrence Type	Select the absence type. Example: *Monthly Time Off*.
Length Value	7
Length Attribute Operator	*greater than or equal to*

2. Click **OK** and **Create Another Calculation**.

   Create a calculated field that checks whether the worker already has an occurrence for a specific absence type in the calendar year.

   a) Enter these values:

Field	Value
Field Name	*Absence Occurrence Event in the Calendar Year*
Business Object	*Coordinated Absence Event*
Function	*Lookup Field with Prompts*

   b) Click **OK**.

   c) On the **Calculation** tab, select the *Count of Absence Occurrences Matches* report field from the **Source Field** prompt.

   d) In the **Prompts for Source Field** grid, enter these values:

Prompt Field	Value Type	Value
Start Date	*Determine Value at Runtime*	*First Day of This Calendar Year*
End Date	*Determine Value at Runtime*	*Last Day of This Calendar Year*
Length Attribute	*Specify Value*	*Workdays*
Count Operator	*Specify Value*	*greater than or equal to*

Prompt Field	Value Type	Value
Absence Occurrence Type	*Specify Value*	Select the absence type. Example: *Absence Table Sample (Days)*.
Length Attribute Operator	*Specify Value*	*greater than or equal to.*
Count of Occurrences	*Specify Value*	*2*

3. Click **OK** and **Create Another Calculation**.

   Create a calculated field that checks that the worker has requested a block of time off during the calendar year with at least 10 consecutive days.

   a) Enter these values:

Field	Value
Field Name	*Absence Occurrence with Length of 10 or more in the Calendar Year*
Business Object	*Coordinated Absence Event*
Function	*Lookup Field with Prompts*

   b) Click **OK**.

   c) On the **Calculation** tab, select the *Count of Absence Occurrences Matches* report field from the **Source Field** prompt.

   d) In the **Prompts for Source Field** grid, enter these values:

Prompt Field	Value Type	Value
Start Date	*Determine Value at Runtime*	*First Day of This Calendar Year*
End Date	*Determine Value at Runtime*	*Last Day of This Calendar Year*
Length Attribute	*Specify Value*	*Calendar Days*
Count Operator	*Specify Value*	*less than or equal to*
Absence Occurrence Type	*Specify Value*	Select the absence type. Example: *Sample Custom Occurrence*.
Length Value	*Specify Value*	*10*
Length Attribute Operator	*Specify Value*	*greater than or equal to*
Count of Occurrences	*Specify Value*	*1*

   e) Click **Done**.

4. Access the *Request Time Off* business process definition.

   Add the calculated fields that you just created to a condition rule on the business process.

5. From the related actions menu of the initiation step, select **Business Process** > **Maintain Step Conditions**.

6. Add a row to the **Validation Conditions** grid for the first condition.

a) Select **Create Condition Rule** from the **Rule** prompt.

b) In the **Description** field, enter: *Absence Occurrence is 7 or more days and there is no attachment.*

c) Define the **Rule Conditions**.

And/Or	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
And	*Attachments*	*is empty*	*Value specified in this filter*	
And	*Absence Occurrence with Length greater than or equal to 7*	*equal to*	*Value specified in this filter*	Select the check box.

d) Select the *Warning* option in the **Severity** field.

7. Add a row to the **Validation Conditions** grid for the second condition.

a) Select **Create Condition Rule** from the **Rule** prompt.

b) In the **Description** field, enter: *Only 1 Absence Occurrence of this type allowed per calendar year.*

c) Define the **Rule Conditions**.

And/Or	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
And	*Absence Occurrence Event in the Calendar Year*	*equal to*	*Value specified in this filter*	Select the check box.

d) Select the *Critical* option in the **Severity** field.

8. Add a row to the **Validation Conditions** grid for the third condition.

a) Select **Create Condition Rule** from the **Rule** prompt.

b) In the **Description** field, enter: *At least 1 Absence Occurrence of this type in the calendar year is 10 workdays or more.*

c) Define the **Rule Conditions**.

And/Or	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
And	*Absence Occurrence with Length of 10 or more in the Calendar Year*	*equal to*	*Value specified in this filter*	Select the check box.

d) Select the *Warning* option in the **Severity** field.

Result

When workers request time off, Workday displays an:

- Alert if the absence occurrence is for 7 calendar days or more and they don't attach a supporting document.

- Error message that prevents them submitting the request, if they've already requested that absence type in the same calendar year.
- Alert if the absence occurrence is for less than 10 consecutive workdays during the calendar year.

Related Information
Concepts

Concept: Step Conditions

Tasks

Create Calculated Fields

Reference

The Next Level: Absence Occurrences and Absence Case Management

Troubleshooting: Absence Occurrences

Unexpected results for absence occurrence start or end dates on the View Absence Occurrences Detail report.

Cause: You didn't run the conversion to convert existing absence data into absence occurrences in your tenant.

Solution: Security: These domains in the Time Off and Leave functional area:

- *Set Up: Leave of Absence*
- *Set Up: Time Off*
- *Worker Data: Absence Occurrences*
- *Worker Data: Absence Occurrences (Manager View)*

Steps

1. Access the **View Absence Occurrences Detail** report to verify whether the conversion was run and created occurrences for all existing data. If not run, Workday won’t have joined a day of absence that existed before you enabled absence occurrences for that type, with a new consecutive day, entered after you enabled absence occurrences.
2. Access the **Configure Absence Occurrences** task.
3. Ensure that the absence types that you want to enable are selected.
4. Click **OK** to run the conversion and convert all existing data for the selected absence types.

Unexpected results for actual grouping of days into a single occurrence or number of workdays.

Cause: **Days to Include** option isn't set correctly for the absence type.

Solution: Security: These domains in the Time Off and Leave functional area:

- *Set Up: Leave of Absence*
- *Set Up: Time Off*

Steps

1. Access 1 of these tasks depending on the absence type that the occurrence relates to:
    - **Configure Absence Occurrence** (for custom types).
    - **Edit Leave Type**.
    - **Edit Time Off Plan** (for absence table tiers or time off plans).

2. Ensure that you set the **Days to Include** option correctly.

   This option determines which days of absence to include and group as consecutive workdays of absence. For absence tables, Workday joins all days to include from the time off plans on all tiers. Example: If **Days to Include** is:

   - Monday for Tier 1 and Tuesday for Tier 2, the days to include for that absence table is Monday-Tuesday.
   - *Workdays (Non-Holidays)* or *Workdays (Work Hours exceed Holiday Hours)*, verify whether the worker actually has scheduled days for the occurrence date range.

FAQ: Absence Occurrences

What happens to absence occurrences when corrections for specific absence types and dates result in net absences equal to zero?

Absence occurrences only include the net absence taken on specific days. When you correct an absence for a specific day to zero, Workday no longer records an absence for that day.

Example: An employee requests 1 day or 8 hours of paid time off, but later corrects the time entry by -8 hours to set the net time off to zero.

If there are no absences on either side of that date, and the net result for the absence is zero after the correction, the **View Absence Occurrences Detail** report doesn't include an entry for the worker for that date.

If the date that nets to zero is:

- At either side of an absence occurrence, Workday reduces the absence occurrence by 1 day and adjusts the start and end dates accordingly.
- In the middle of an absence occurrence, Workday splits the absence occurrence into 2 separate occurrences, 1 on each side of the day that nets to zero.

Absence Calculations

Evaluate Absence Calculations

Prerequisites

Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area.

Context

You can evaluate absence accrual calculations for a worker from a given date to verify whether you configured the accruals correctly and identify discrepancies in your configuration. Workday enables you to drill into the calculation results of a worker's absence accrual for perform a detailed evaluation.

Steps

1. Access the **Evaluate Absence Calculation** report.

2. Select the accrual configuration that you want to evaluate, and a worker to evaluate against.
3. Specify an **As Of** date that's based on the accrual frequency method. Example: You want to evaluate a worker's accrual for January 2020 in a time off plan with a monthly period schedule. Select either 01/01/2020 or 01/31/2020, depending on the accrual frequency method.

Result

You can use the calculation results on the report to analyze the worker's accrual configuration and make changes if necessary.

The sidebar on the left in the lower pane displays the name of the calculation at each level. You can view the results of each calculation on the right. If the calculation contains embedded calculations, you can expand the folders in the sidebar to drill into each level and view any conditions and embedded calculation results. If there are multiple conditions, Workday displays the processing order and you can drill into view individual calculations, conditions, operators, and operands.

Note: Workday displays the calculation results of date fields in epoch Unix format. Example:1452844800000 converts to a human-readable timestamp of 2024-9-26 14:24:32.

Related Information
Concepts

Concept: Eligibility for Time Off Plans, Time Off, and Accruals on page 2142

Tasks

Steps: Create a Time Off on page 2104

Create Accruals on page 2162

Create Time Off Plans That Track Balances on page 2126

Create Time Off Plans That Don't Track Balances on page 2135

Evaluate Absence Eligibility

Prerequisites

Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in Time Off and Leave functional area.

Context

Test whether a worker is eligible for time off plans, accruals, or time offs as of a selected date. Use this report to verify whether you configured calculations correctly and to gain insight as to why a worker is eligible or ineligible for an absence component.

Steps

1. Access the **Evaluate Absence Eligibility** report.
2. Select the parameters with which to evaluate eligibility.

   If you select a position-based time off plan, accrual, or time off, you must also specify a **Position**. Workday automatically populates the field if the worker has only 1 position.
3. (Optional) In the results, click each calculation for configuration details.

   Workday represents calculations that use other calculations as folders. Expand the folders to view details for the nested calculations.

Result

The report displays whether or not the worker passes all of the eligibility criteria for that absence component as of the selected date. The calculation details also display any execution errors if a calculation fails to complete.

Related Information

Concepts

Concept: Eligibility for Time Off Plans, Time Off, and Accruals on page 2142

Tasks

Steps: Create a Time Off on page 2104

Create Accruals on page 2162

Create Time Off Plans That Track Balances on page 2126

Create Time Off Plans That Don't Track Balances on page 2135

Concept: Absence Calculations

You can create numeric, boolean, and date calculations as part of accrual calculations or eligibility criteria in different parts of Absence Management. Examples: Time off plans, accruals. You can create simple calculations, or you can nest calculations by selecting an existing calculation as an operand of another. You can use these types of calculations:

- Absence balances.
- Aggregate.
- Arithmetic.
- Conditional.
- Constant value.
- Date constant.
- Date extract.
- Date difference.
- Date increment.
- Instance set comparison.
- Lookup.
- Lookup tables.
- Value comparison.

Example: The monthly accrual for Betty Liu is based on her length of service. You can use these types of calculations to determine her accrual rate and to prorate this value by her full-time equivalent (FTE), respectively:

- Lookup, for her length of service.
- Arithmetic.

Note: Workday only supports custom fields under specific conditions in calculations. See Concept: Requirements for Custom Fields in Calculations.

Using Workday-Delivered Report Fields in Absence and Payroll

Absence and Payroll share the same calculation engine. You can use some fields in both Absence and Payroll, while some are intended for use only in Payroll. Using a report field in the wrong product area can lead to issues such as stack-trace errors and incorrect calculations. To identify whether the field is suitable for use in Absence, check:

- That the **Category** on the field includes *Time Off*.
- The field name. Typically, field names ending with *Period Start Date* or *Period End Date*, are suitable for use in Absence. Field names ending with *Sub-Period Start Date* or *Sub-Period End Date* are suitable for use only in Payroll.

As you review your Absence configuration for Payroll only fields, keep in mind that the calculations might currently be in use by both Absence and Payroll. Before you edit a calculation in Absence, check the usage to make sure that it's not also in use in Payroll. If it's in use in Payroll, create a new calculation for use in Absence.

You can use these report fields and instance value calculations (IVCs) to pull worked hours into absence calculations.

Report Field or IVC	Description
Pay Component for Workday Payroll Related Payroll Result Line	This report field provides the pay component of the Workday Payroll related payroll result line. Use to retrieve worked hours for specific pay components.
Payroll Hours Related Result Lines for Period	This report field provides completed hours for the worker where the result lines are for prorated or unprorated hours-related calculations and the period end date is within the date range of the absence period.
Payroll Hours Related Result Lines YTD	This report field provides completed hours for the worker where the result lines are for prorated or unprorated hours-related calculations and the period end date is within the date range of the balance period start and end dates.
Workday Payroll Related Result Line Amount	This IVC provides the amount of the Workday Payroll related result line.

Example: To calculate the amount of time off to grant Betty Liu each period, you want to:

- Sum the number of hours she's paid for in a period.
- Multiply the sum of hours worked by 0.25 hours of vacation per hour worked.

You can create:

- An aggregate calculation that uses the *Payroll Hours Related Result Lines for Period* report field to sum the actual hours that Betty Liu works.
- An arithmetic calculation that uses the result of the aggregate calculation.

Unsupported Periods in Absence

Workday doesn't support using calculations that reference academic pay periods or disbursement plan periods in Absence calculation fields as they don't use Absence period schedules. See:

- Setup Considerations: Period Schedules
- Create Period Schedules for Time Off
- Reference: Balance Calendars
- Set Up Academic Pay Period Calendar

Related Information
Concepts

Concept: Calculated Fields and Calculations

Concept: Requirements for Custom Fields in Calculations

Setup Considerations: Time Off Calculations for Payroll

Tasks

Create Calculations

Reference

Reference: Calculations and Calculated Fields Comparison

Reference: Date Calculations

Reference: Numeric Calculations

Reference: Boolean Calculations

Troubleshooting: Calculations

The Next Level: The Calculation Engine Behind Absence Management

Examples

Example: Configure Accruals Relative to Hire Date and Years of Service on page 2206

Example: Position-Based Accrual on page 2196

Leave Balance Deduction Override

Setup Considerations: Leave Balance Deduction Override

You can use this topic to help make decisions when planning your configuration and use of Leave Balance Deduction Overrides. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Leave Balance Deduction Overrides enables you to configure leave types to allow workers to take the twice the amount of leave by deducting from their leave balance at half the rate.

Business Benefits

This helps you to allow workers to take their leave in accordance with local regulations.

Use Cases

A worker has an entitlement of 25 days of leave at their full rate. You can use a leave balance deduction override on the leave type so that they can instead take 50 days of leave at half of the rate of deduction.

A worker has an entitlement of 50 days for Paid Parental Leave at full rate of deduction. They submit a leave request for 25 days at full rate of deduction, followed by 50 days at half rate of deduction. Their leave balance will be 0 at the end of 75 days. This override enables you to allow leave to be taken at double the duration while deducting from the leave balance at half of the rate.

Questions to Consider

Which leave types do you want to enable Leave Balance Deduction Override on?	The main leave type and the additional leave type must both of the same type, position based or not.
Will you update existing leave types to have a Leave Balance Deduction Override?	If there are previous leave requests of the existing leave type, they will be retroactively updated.

Requirements

- Additional leave types that you select in the configuration must not track balances.
- The main leave type and the additional leave type for a Leave Balance Deduction Override must use the same units. The additional leave type that you select will count as units taken for the main leave type.

Limitations

Entitlement per Event isn't supported with Leave Balance Deduction Overrides.

Security

Set Up: Leave of Absence in the Time Off and Leave functional area to provide access to configure and view Leave Balance Deduction Overrides.

Reporting

You can use the **All Leave Families** report to see the leave types that have Leave Balance Deduction Override enabled in the **Leave Balance Deduction Override** column.

Connections and Touchpoints

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Steps: Set Up a Leave Balance Deduction Override

Prerequisites

Security: This domain in the Time Off and Leave functional area:

- *Set Up: Leave of Absence.*

Context

You can enable a Leave Balance Deduction Override on a leave type so that workers can take twice the amount of leave by deducting from a leave balance at half of the rate.

Steps

1. Access the **Create Leave Type** task to create a new leave type, or **Edit Leave Type** task to access an existing leave type to enable Leave Balance Deduction Override on.
2. On the **Balance/Leave Taken** tab, select the **Leave Balance Deduction Override** check box.
3. Select one or more **Additional Leave Types**. Any additional leave type that you select must not track balances. The main leave type and the additional leave types must use the same units, and must be the same type, position based, or not position based. The additional leave type that you select will count as units taken for the main leave type.

Result

When a worker takes leave of the configured leave type, they will deduct from the balance at half of the original rate.

On the **Request Absence** task, workers will see their available and remaining leave balances that they can make a request against with the selected leave type. The **Available Balance** displays their balance at the override rate, which is double the entitlement. The **Remaining Balance** displays the available balance minus the requested amount.

Note: If you update an existing leave type, all previous leave requests of that type will be retroactively updated.

Note: A worker's leave entitlement is always shown at the of the full rate of deduction, not the Leave Balance Deduction Override rate.

Next Steps

Use the **All Leave Families** report to see which leave types have leave balance deduction override enabled.

Time Tracking

Time Tracking Basics

Steps: Set Up Time Tracking

Context

Configure Workday Time Tracking so that:

- Workers, administrators, and others can enter time.
- Workday automatically applies overtime, premiums, and other pay policies.
- Payroll can compensate workers for time worked.

Time Tracking setup is often an iterative process. It isn't necessary to follow these steps in the order listed.

Steps

1. Set up time entry rules.

   See Steps: Set Up Time Entry on page 2440.
2. Set Up Payroll and Time Tracking Period Schedules.

   Create time period schedules to define the dates for which workers can enter time.
3. Create Worker Eligibility Rules for Time Tracking on page 2600.
4. Create time calculations.

   Skip this step if you're not interested in having Workday perform calculations. Example: If you're using Workday Time Tracking only for project tracking.

   See Steps: Set Up Calculations for Time Tracking on page 2509.
5. Create Time Entry Validations on page 2586.
6. Create work schedules and holiday schedules.

   Define work schedule calendars to specify the days workers are scheduled to work and the start of the work week. You can also use work schedule calendars to assign dates to in/out time entries according to a day breaker other than midnight.

   By default the work week starts on Sunday at 12:00 AM. Even when the default settings apply, Workday recommends that you create a basic work schedule to indicate typical nonworking days.

   You can also create a holiday calendar so that holiday names display on the time entry calendar. When using a holiday calendar, you can also create calculations that take holidays into account.

   See Steps: Create Calendars.
7. Configure payroll to pay time.

   Configure Workday Payroll or Workday Cloud Connect for Third-Party Payroll to retrieve approved time when you run payroll.

   See Steps: Set Up Payroll to Pay Time on page 2605 or Select Fields for Payroll Extract.
8. (Optional) Specify how to manage time off.

   See Concept: Time Tracking and Absence Management on page 2607.